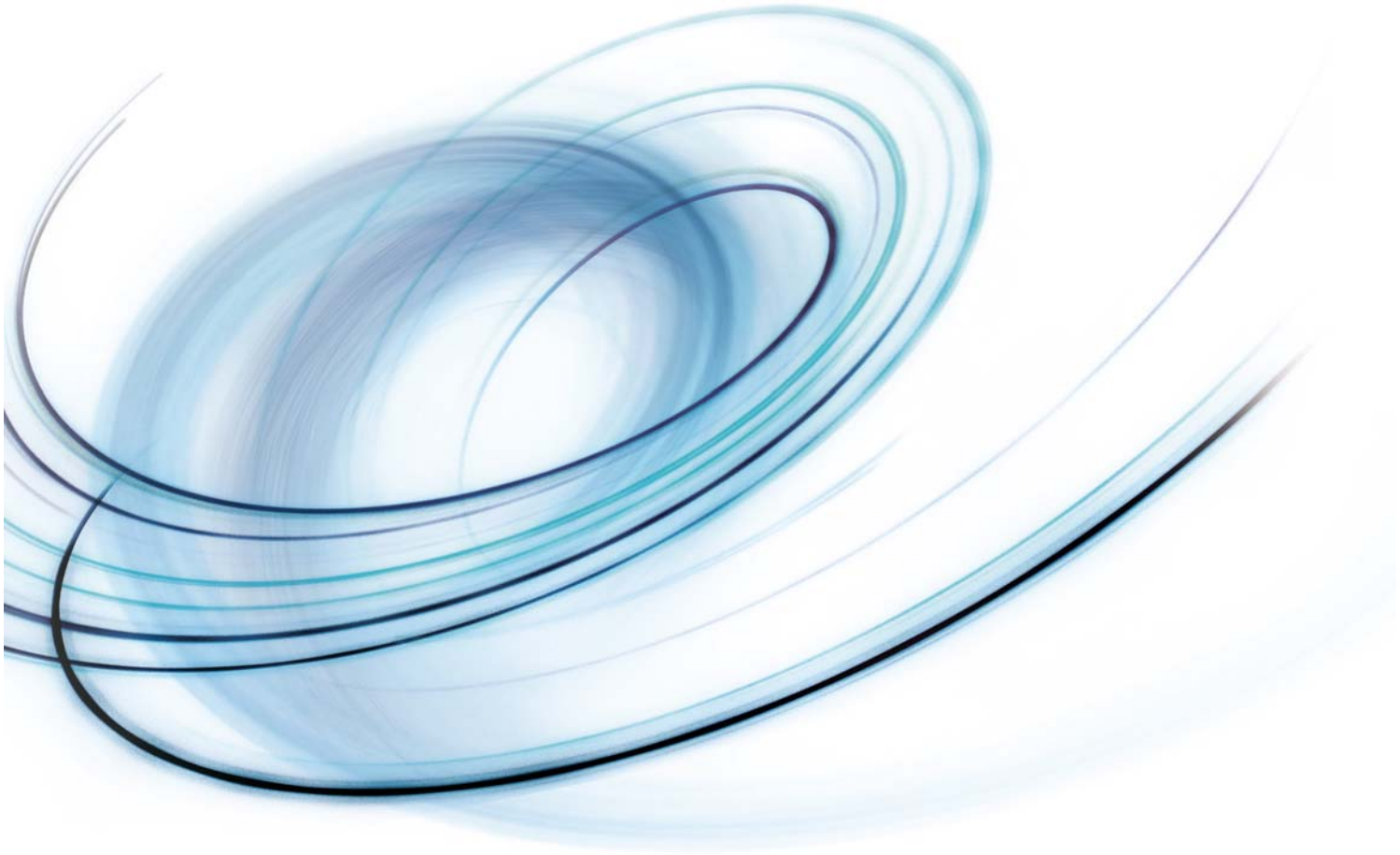
# ADOBE® ACROBAT® 8 STANDARD

USER GUIDE



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Adobe® Acrobat® 8 Standard for Windows® and Mac OS

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# Chapter 1: Before you begin

## Installation

### Requirements

To review complete system requirements and recommendations for your Adobe® software, see the Read Me file included with your software.

### Install the software

1 Close any other Adobe applications open on your computer.

2 Insert the installation disc into the disc drive, and follow the on-screen instructions.

***Note:*** *For more information, see the Read Me file included with your software.*

### Activate the software

Adobe software may include license management technology to ensure compliance with the product license agreement. When present, this technology prompts you to verify the license of your product within 30 days after you first use it. Verification is mandatory.

You may be prompted to activate the software. The verification process doesn't collect, transmit, or use any information about the identity of users. For more information on this topic, see the Read Me file on your installation disc, or visit the Adobe website at www.adobe.com/go/activation.

1 If the Activation dialog box isn't already open, choose Help > Activation > Activate.

2 Follow the on-screen instructions.

***Note:*** *If you want to install the software on a different computer, you must first deactivate the software on your computer: Choose Help > Activation > Deactivate.*

### Register

Register your product to receive complimentary installation support, notifications of updates, and other services.

❖ To register, follow the on-screen instructions in the Registration dialog box, which appears after you install and activate the software.

*If you postpone registration, you can register at any time by choosing Help > Registration.*

### Read Me

The installation disc contains the Read Me file for your software. (This file is also copied to the application folder during product installation.) Open the file to read important information about the following topics:

- System requirements
- Installation
- Registration

- Electronic licensing
- Legal notices

# Using Adobe Help

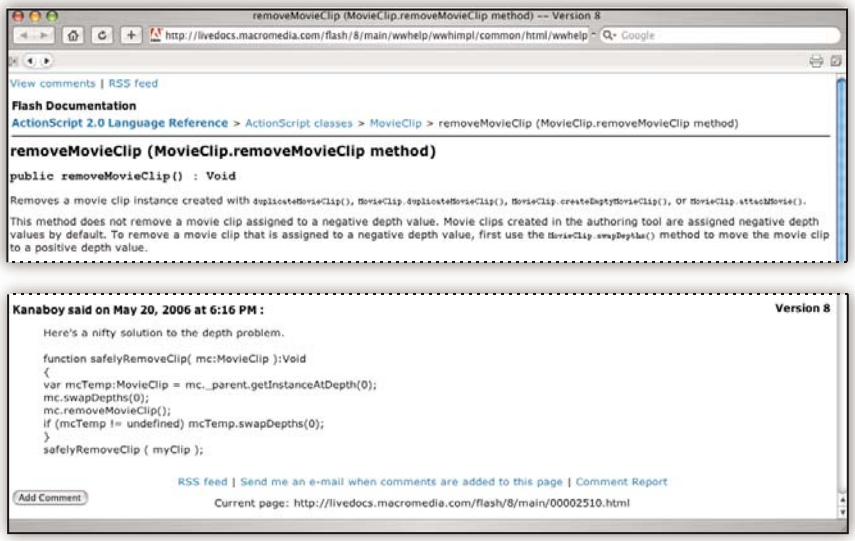
## Adobe Help resources

Documentation for your Adobe software is available in a variety of formats.

### In-product and LiveDocs Help

In-product Help provides access to all documentation and instructional content available at the time the software ships. It is available through the Help menu in your Adobe software.

LiveDocs Help includes all the content from in-product Help, plus updates and links to additional instructional content available on the web. For some products, you can also add comments to the topics in LiveDocs Help. Find LiveDocs Help for your product in the Adobe Help Resource Center, at www.adobe.com/go/documentation.




Most versions of in-product and LiveDocs Help let you search across the Help systems of multiple products. Topics may also contain links to relevant content on the web or to topics in the Help of another product.

Think of Help, both in the product and on the web, as a hub for accessing additional content and communities of users. The most complete and up-to-date version of Help is always on the web.

### How To topics

The How To topics provide a brief overview of the most common tasks. If you need more information, click the link at the bottom of the How To topic to view the related Help topic.

### PDF documentation

The in-product Help is also available as an Adobe PDF that is optimized for printing. Other documents, such as installation guides and white papers, may also be provided as PDFs.

All PDF documentation is available through the Adobe Help Resource Center, at www.adobe.com/go/documentation. To see the PDF documentation included with your software, look in the Documents folder on the installation or content DVD.

### Printed documentation

Printed editions of the in-product Help may be available for purchase in the Adobe Store, at www.adobe.com/go/store. You can also find books published by Adobe publishing partners in the Adobe Store.

A printed workflow guide is included with all Adobe Creative Suite® 3 products, and stand-alone Adobe products may include a printed getting started guide.

***Note:*** *Printed documentation is not available in all languages.*

## Using Help in the product

In-product Help is available through the Help menu. After you start the Adobe Help Viewer, you can access Help for additional Adobe products installed on your computer. Topics may contain links to additional content on the web.



*If you search for a phrase, such as "shape tool," enclose it in quotation marks to see only those topics that include all the words in the phrase (applies to roman language versions of the software).*

### Accessibility features

Adobe Help content is accessible to people with disabilities—such as mobility impairments, blindness, and low vision. In-product Help supports these standard accessibility features:

- The user can change text size with standard context menu commands (Microsoft® Windows®) and standard menu commands (Apple Mac OS).
- Links are underlined for easy recognition.
- If link text doesn't match the title of the destination, the title is referenced in the Title attribute of the Anchor tag. For example, the Previous and Next links include the titles of the previous and next topics.
- Content supports high-contrast mode.
- Images without captions include alternate text.
- Each frame has a title to indicate its purpose.
- Standard HTML tags define content structure for screen reading or text-to-speech tools.
- Style sheets control formatting, so there are no embedded fonts.

### Keyboard shortcuts for Help toolbar controls (Windows)

**Back button** Alt+Left Arrow

**Forward button** Alt+Right Arrow

**Print** Ctrl+P

**About button** Ctrl+I

**Help For menu** Alt+Down Arrow or Alt+Up Arrow to view Help for another application

**Keyboard shortcuts for Help navigation (Windows)**

- To move between panes, press Ctrl+Tab (forward) and Shift+Ctrl+Tab (backward).
- To move through and outline links in a pane, press Tab (forward) or Shift+Tab (backward).
- To activate an outlined link, press Enter.
- To change text size, press Ctrl/Command+plus sign (+) or Ctrl/Command+minus sign (-).

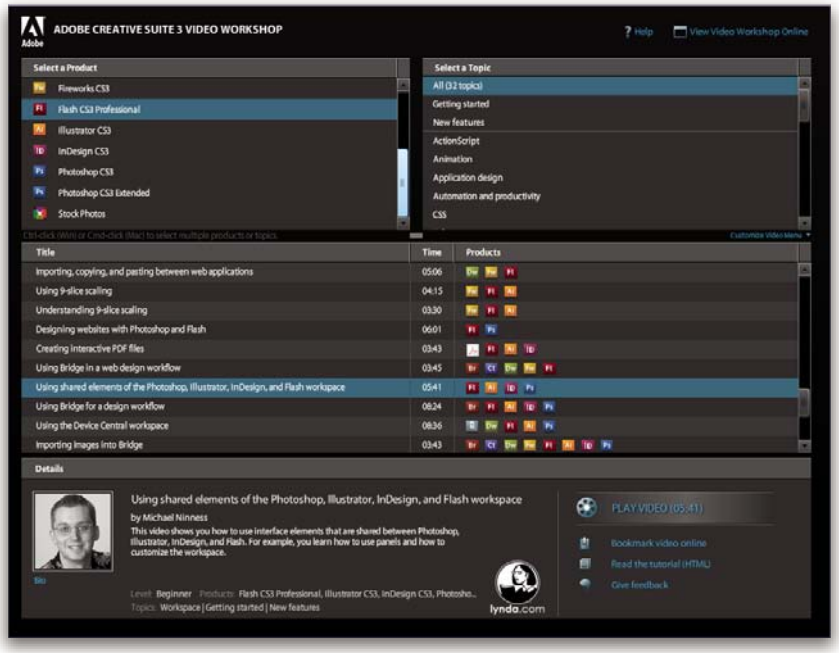
# Resources

## Adobe Video Workshop

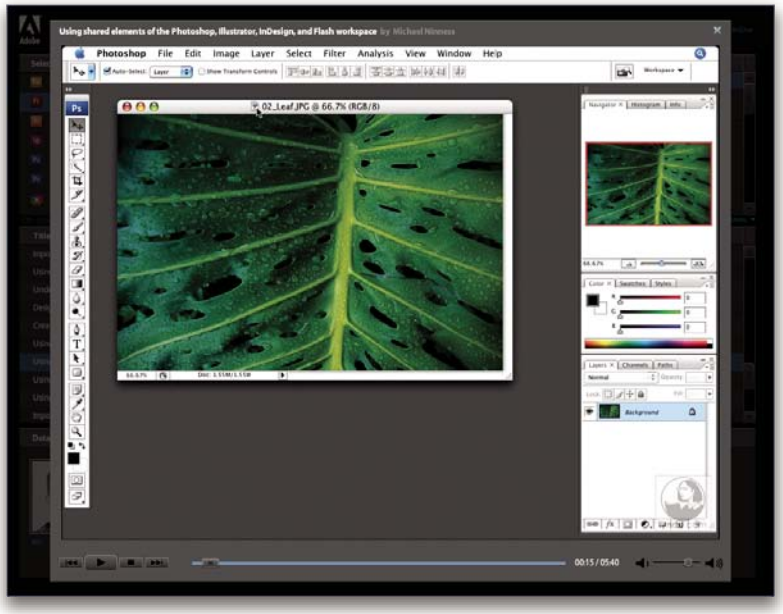
Adobe Creative Suite 3 Video Workshop offers over 200 training videos covering a wide range of subjects for print, web, and video professionals.

You can use Adobe Video Workshop to learn about any Creative Suite 3 product. Many videos show you how to use Adobe applications together.

***Note:*** *Adobe Video Workshop is not available in all languages.*



When you start Adobe Video Workshop, you choose the products you want to learn and the subjects you want to view. You can see details about each video to focus and direct your learning.




**Community of presenters**

With this release, Adobe Systems invited the community of its users to share their expertise and insights. Adobe and lynda.com present tutorials, tips, and tricks from leading designers and developers such as Joseph Lowery, Katrin Eismann, and Chris Georgenes. You can see and hear Adobe experts such as Lynn Grillo, Greg Rewis, and Russell Brown. In all, over 30 product experts share their knowledge.

**Tutorials and source files**

Adobe Video Workshop includes training for novices and experienced users. You'll also find videos on new features and key techniques. Each video covers a single subject and typically runs about 3-5 minutes. Most videos come with an illustrated tutorial and source files, so you can print detailed steps and try the tutorial on your own.

**Using Adobe Video Workshop**

You can access Adobe Video Workshop using the DVD included with your Creative Suite 3 product. It's also available online at www.adobe.com/go/learn_videotutorials. Adobe will regularly add new videos to the online Video Workshop, so check in to see what's new.

## Acrobat videos

Adobe Video Workshop covers a wide range of subjects for Adobe Acrobat®, including these:

- Setting up the workspace and taskbars
- Combining files into a PDF
- Converting PDFs
- Modifying PDFs

- Adding comments to PDFs
- Working with shared reviews
- Reviewing and summarizing comments
- Adding security to forms
- Collaborating in real time with Adobe Acrobat Connect™
- Preflighting files
- Printing documents

To access Adobe Creative Suite 3 video tutorials, visit Adobe Video Workshop at www.adobe.com/go/learn_videotutorials.

***Note:*** *Adobe Video Workshop is not available in all languages.*

## Extras

You have access to a wide variety of resources that will help you make the most of your Adobe software. Some of these resources are installed on your computer during the setup process; additional content is included on the installation or content disc, if applicable. Unique extras are also offered online by the Adobe Exchange community, at www.adobe.com/go/exchange.

### Installed resources

During software installation, a number of resources are placed in your application folder. To view those files, navigate to the application folder on your computer.

### Disc content

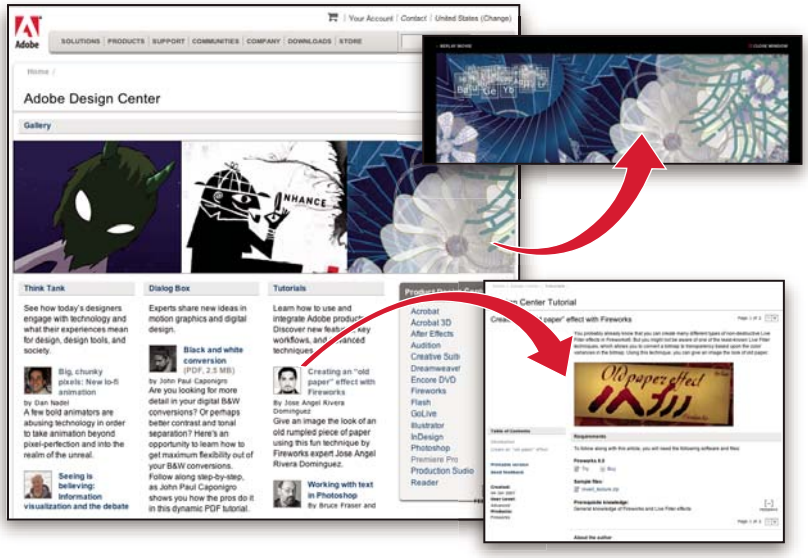
The disc included with your product may contain additional resources for use with the software, such as presets, plug-ins, a PDF version of the Help, technical information, and other documents.

### Adobe Exchange

For more free content, visit www.adobe.com/go/exchange, an online community where users download and share thousands of free actions, extensions, plug-ins, and other content for use with Adobe products.

## Adobe Design Center

Adobe Design Center offers articles, inspiration, and instruction from industry experts, top designers, and Adobe publishing partners. New content is added monthly.




You can find hundreds of tutorials for design products and learn tips and techniques through videos, HTML tutorials, and sample book chapters.

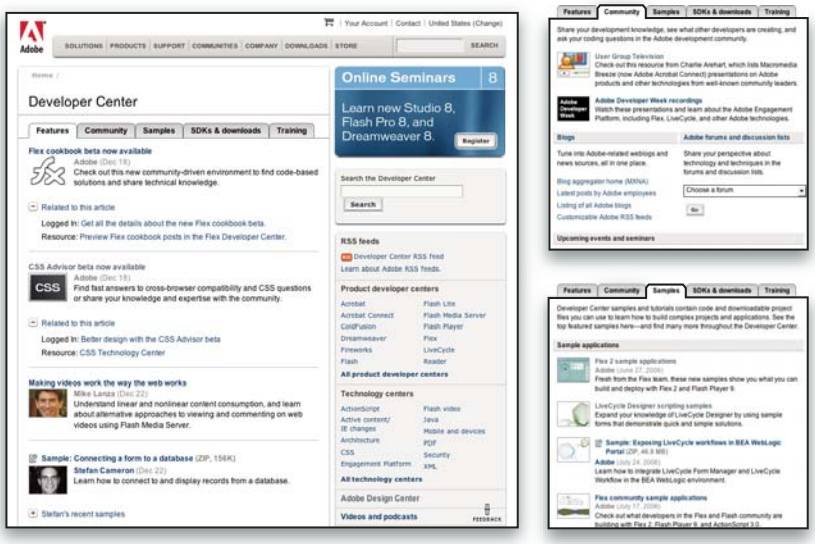
New ideas are the heart of Think Tank, Dialog Box, and Gallery:

- Think Tank articles consider how today's designers engage with technology and what their experiences mean for design, design tools, and society.
- In Dialog Box, experts share new ideas in motion graphics and digital design.
- The Gallery showcases how artists communicate design in motion.

Visit Adobe Design Center at www.adobe.com/designcenter.

## Adobe Developer Center

Adobe Developer Center provides samples, tutorials, articles, and community resources for developers who build rich Internet applications, websites, mobile content, and other projects using Adobe products. The Developer Center also contains resources for developers who develop plug-ins for Adobe products.




In addition to sample code and tutorials, you'll find RSS feeds, online seminars, SDKs, scripting guides, and other technical resources.

Visit Adobe Developer Center at www.adobe.com/go/developer.

## Customer support

Visit the Adobe Support website, at www.adobe.com/support, to find troubleshooting information for your product and to learn about free and paid technical support options. Follow the Training link for access to Adobe Press books, a variety of training resources, Adobe software certification programs, and more.

## Downloads

Visit www.adobe.com/go/downloads to find free updates, tryouts, and other useful software. In addition, the Adobe Store (at www.adobe.com/go/store) provides access to thousands of plug-ins from third-party developers, helping you to automate tasks, customize workflows, create specialized professional effects, and more.

## Adobe Labs

Adobe Labs gives you the opportunity to experience and evaluate new and emerging technologies and products from Adobe.

At Adobe Labs, you have access to resources such as these:

- Prerelease software and technologies
- Code samples and best practices to accelerate your learning
- Early versions of product and technical documentation

- Forums, wiki-based content, and other collaborative resources to help you interact with like-minded developers

Adobe Labs fosters a collaborative software development process. In this environment, customers quickly become productive with new products and technologies. Adobe Labs is also a forum for early feedback, which the Adobe development teams use to create software that meets the needs and expectations of the community.

Visit Adobe Labs at www.adobe.com/go/labs.

### User communities

User communities feature forums, blogs, and other avenues for users to share technologies, tools, and information. Users can ask questions and find out how others are getting the most out of their software. User-to-user forums are available in English, French, German, and Japanese; blogs are posted in a wide range of languages.

To participate in forums or blogs, visit www.adobe.com/communities.

# What's new

#### Viewing, navigating, and searching

**Getting Started window** At a glance, see the main features of Adobe® Acrobat® 8 Standard and click links to start tasks or learn more about features. See "Start in the Getting Started window" on page 18.

**Maximized work area** View PDFs in a new visual design for the work area, navigation pane, and toolbars. User interface elements have been removed to maximize space. See "View the work area" on page 14.

**Customizable toolbars** Easily hide or show individual tools by right-clicking/Control-clicking a toolbar, or use the More Tools dialog box to customize toolbars. See "Display and arrange toolbars" on page 19.

**Search enhancements** Find words or use advanced search tools, all from the same integrated toolbar. View search results in a floating, resizable panel. Search documents in a PDF package. See "Search features overview" on page 281.

**Embedded PDF search index** Embed a search index for a specific file directly within the PDF to speed up searching. See "Create and manage an index in a PDF" on page 287.

#### PDF creation, assembly, and editing

**PDF from a blank page** Create a blank PDF page and type text onto the page. Format text using formatting controls. Lock the document so that it can't be edited. See "Create a PDF from a blank page" on page 60.

**PDF packages** Assemble PDF files (including PDF forms) and non-PDF files into a single package. Files aren't modified when packaged, so signatures and security options stay intact. Documents within a package are viewed in the same window. Easily add, delete, or extract documents from the package. Search and print the current or selected document, or all documents within the package. See "About PDF packages" on page 112.

**Combined files user interface** Combine files into a single PDF with concatenated pages, or assemble files into a PDF package. Choose simple options to control the size of the resulting PDF. See "Combining different types of files" on page 112.

**Mail merge to PDF within Microsoft® Word** Convert Word mail merge documents to PDF and send them out by email. See "Create PDFs from Word mail merges" on page 77.

**Microsoft Excel worksheet enhancements** (Windows) Select and order worksheets for conversion. Convert all links and bookmarks. Create PDF/A-compliant files. See "Application-specific PDFMaker settings" on page 79.

**Microsoft PowerPoint presentation enhancements** (Windows) Convert overlapping shapes and images, action buttons, action settings, and speaker notes. Convert backgrounds to a separate, nonprinting layer. Create PDF/A-compliant files. See "Application-specific PDFMaker settings" on page 79.

**Email conversion enhancements** Convert an email message or a complete mail folder to PDF from Lotus Notes. Create PDF packages of email from both Microsoft Outlook and Lotus Notes. In Outlook on Windows, convert email archives to PDF packages and automatically archive email on a schedule. See "Convert email messages to PDFs (Windows)" on page 74, "Migrate old Outlook PDF archives to PDF packages (Windows)" on page 76, and "Set up automatic email archiving (Windows)" on page 77.

**Scanning enhancements** Scan to PDF or PDF/A from a broader range of scanners. Add metadata while scanning. Optimize a scanned PDF. See "Scan a paper document to PDF" on page 61.

**PDF/A-compliant files** Create PDF/A-compliant files when scanning paper documents and when creating PDFs from Word, Microsoft Excel, Microsoft PowerPoint, Adobe Acrobat Distiller, and the Acrobat Preflight tool.

**Document examination** Inspect PDFs for metadata, annotations, attachments, hidden data, form fields, hidden layers, or bookmarks. Remove some or all of the information. See "Examine a PDF for hidden content" on page 197.

**Headers, footers, watermarks, and backgrounds** Save header, footer, watermark, and background options as named settings for reuse. Remove or update existing headers, footers, watermarks, and backgrounds. Shrink content to accommodate headers and footers. Preview changes in real time. Set underline text. See "Add and edit headers and footers" on page 118.

### Review and commenting

**Acrobat Connect meetings** Access the real-time, web-based collaboration capabilities of Acrobat Connect (sold separately). Click the Start Meeting button to escalate from a document review to real-time communication with others over the Internet. Acrobat Connect uses Adobe Flash® CS3 Professional and a personal meeting room for screen sharing, audio and video conferencing, whiteboarding, and more. When you first click the Start Meeting button, you can create a free trial account. Each subsequent time, you go directly to your Acrobat Connect personal meeting room. (Acrobat Connect is not available in all languages.) See "Meetings" on page 150.

**Shared reviews** Initiate a review where comments are stored on a central server, allowing all participants to see comments in real time. No extra server software is needed. Shared reviews work with a folder on a network server, a Windows SharePoint workspace, or a web folder on a web server. Comments are automatically retrieved, even if Reader isn't running and could be added even when you are disconnected from the network. Notifications alert users that there are new comments. Comments from reviewers outside the firewall can be merged into the shared review, and you can enable Reader users to participate in reviews. See "Start a shared review" on page 146.

**Review Tracker** Provides details about all active reviews. For shared reviews, details include the number of comments from a reviewer, the review deadline, server status, unread reviews, and a summary of updated shared reviews. See "Tracking PDF reviews" on page 155.

**Commenting and markup enhancements** View and accurately place callout and cloud markups as you apply them. The callout leader automatically moves as you position the callout. Selected comments are highlighted for easier visibility when zoomed out. Rotate stamps and select all tools from a single, integrated toolbar. See "Commenting" on page 158.

### Digital signatures

**Roaming IDs** Enroll in a signing service where the server holds your private key. Authenticate to the server from Acrobat and allow the document to be signed with your credentials stored on the server. See "Set up a roaming ID account" on page 200.

**Signature preview mode and conformance checker** Before signing, view the document content as it will appear after eliminating transparency, scripts, fonts, and other dynamic content that can alter a document's appearance. Acrobat automatically runs the Document Integrity Checker, which now includes checking for Qualified Signatures conformance before entering signature preview mode. See "Sign in Preview Document mode" on page 225.

**Certificate enhancements** Predetermine the signing certificate. Configure the chain model for certificate validation. See "Sharing and managing certificates" on page 203.

**Seed values** Specify which choices a user can make when signing a document. See "Customizing signature properties using seed values" on page 222.

### Additional new features

**FIPS mode** Version 8.1 of Acrobat provides a FIPS mode to restrict data protection to Federal Information Processing Standard (FIPS) 140-2 approved algorithms using the RSABSAFE Crypto-C 2.1 encryption module. See "Securing PDFs in FIPS mode (Windows)" on page 209.

**Microsoft Windows Vista™ support** Version 8.1 of Acrobat supports Windows Vista.

**Installing Acrobat on 64-bit versions of Windows** Version 8.1 of Acrobat supports the 64-bit versions of Microsoft Windows XP and Windows Vista.

**Version Cue 2.0** Manage files and versions as a single user or in a small workgroup. Integrate with Adobe Bridge to manage files for your Creative Suite projects. See "Adobe Version Cue" on page 336.

**Digital Editions** Read and organize eBooks and other publications with Adobe® Digital Editions (a separate product). When you first click the Digital Editions menu item, you can download and install the Adobe Digital Editions software. After installation, choose Digital Editions to go directly to your Adobe Digital Editions bookshelf. See "Adobe Digital Editions" on page 51.

**Booklet printing** Print pages as a simple booklet, for example, 2-up, saddle-stitched. See "Print a booklet" on page 329.

**Printing over the Internet** Print documents to a FedEx Kinkos office in the United States. See "Print over the Internet" on page 325.

**Forms Tracker** Track the forms you fill out. See "About Forms Tracker" on page 192.

**2D Measurement tool enhancements** Measurement is recalculated if start or end points move. Measurements snap to lines, intersections, or corners. See "Measure the height, width, or area of objects" on page 41.

# Chapter 2: Workspace

As you get acquainted with Adobe® Acrobat® 8 Standard, make setting up your Acrobat work environment a priority. The more you learn about its potential, the better you can take advantage of its features, tools, and options.

There's much more to the application than you see at first glance. Acrobat has hidden tools, preferences, and options that can enhance your experience and give you greater control over how your work area is arranged and displayed.

## Quickstart

### Customize the work area

You can change the work area to suit your needs.

- To change the toolbars that appear, choose View > Toolbars, and select the desired toolbars.
- To change the navigation pane view, click one of the buttons to the left of the navigation pane.
- To customize the display colors for page background and document text, choose Edit > Preferences > Accessibility.
- To set the default zoom level and page layout, choose Edit > Preferences > Page Display.

#### See also

"Customizing the work area" on page 18

### Move a toolbar

Some toolbars, such as the Tasks toolbar, appear in the toolbar area. Others, such as the Comment & Markup toolbar, open as floating toolbars.

❖ To move a toolbar, drag the grabber bar at the left edge of the toolbar:

- Drag a toolbar to a new location in the toolbar area.
- Drag a toolbar out of the toolbar area to create a floating toolbar.
- Drag a floating toolbar into the toolbar area.

#### See also

"Display and arrange toolbars" on page 19

### Add tools and toolbars

You can customize Acrobat to display the tools and toolbars you use most often.

❖ Right-click/Control-click a toolbar and do any of the following:

- Select the buttons you want to display.
- Choose Hide Toolbars and select the toolbars you want to hide.

• Choose More Tools, and select the toolbars and buttons you want to display.

### See also

"Show and hide toolbar elements" on page 21

## Change the look of a tool or object

You can easily change the properties for many tools and objects, including comments, form fields, and bookmarks.

**1** Right-click/Control-click the tool or object you want to change.

**2** Choose Properties or Tool Default Properties.

**3** Set the desired properties.

To apply an object's settings to all subsequent objects of the same type, right-click/Control-click the object and choose Make Current Properties Default or Use Current Properties As New Defaults.

### See also

"Review properties for tools and objects" on page 21

## Change viewing mode

To give you more space for reading a document, you can change the viewing mode.

❖ Choose View > Reading Mode or Full Screen Mode.

In Reading mode, toolbars and the navigation pane are hidden but the menu bar is present. In Full Screen mode, everything but the document is hidden. To exit from Full Screen mode, press Esc.

### See also

"View PDFs in Full Screen mode" on page 29

## View PDFs in a package

An Adobe PDF package opens with a list of the PDFs it contains and a PDF package navigation bar.

❖ Open the package and do any of the following:

• To view a PDF, select it from the PDF list or click Open Next or Open Previous .

• To change the position of the PDF list, click one of the list position icons.

• To access package-related commands, click Options and choose the desired command.

### See also

"View, sort, and search components in a PDF package" on page 26

## View attachments

A PDF may have other PDFs attached to it, either as single files or a PDF package. When you open a PDF containing attachments, the Attachment panel opens automatically.

❖ Double-click the desired PDF. The attachment opens in a new window.

If the attachment is a PDF package, the first PDF in the package opens along with a list of all PDFs in the package. Click a PDF to view it.

### See also

"PDFs with file attachments" on page 29

## Reduce PDF file size

Reducing the size of PDFs improves their performance—particularly when they're being accessed on the web.

1. Choose Document > Reduce File Size.
2. Select the version compatibility you need, and click OK.
3. Specify a filename and location, and click Save.

If you're certain that all your users use Acrobat 8 or Adobe Reader 8, limiting compatibility to the latest version can further reduce file size.

### See also

"Reduce file size by saving" on page 45

## Locate PDFs in the Organizer

The Organizer helps you quickly locate PDFs you've previously opened and PDFs you've organized into collections or favorites.

1. Choose File > Organizer > Open Organizer.
2. Click in the categories pane on the left to locate PDFs.

All PDFs found are listed in the files pane. After you locate a PDF, you can use the buttons at the top of the Organizer to work with the file.

### See also

"Organizer window overview" on page 45

# Work area basics

## View the work area

Acrobat opens in two different ways: as a stand-alone application, and in a web browser. The associated work areas differ in small but important ways.

The Acrobat work area includes a *document pane* that displays PDFs and a *navigation pane* on the left side that helps you browse through the current PDF. Toolbars near the top of the window provide other controls that you can use to work with PDFs.

***Note:*** *Opening certain types of PDFs causes specialized parts of the work area to appear: the document message bar and PDF package navigation features. For other types of PDFs, these areas are not seen and not available.*

## See also

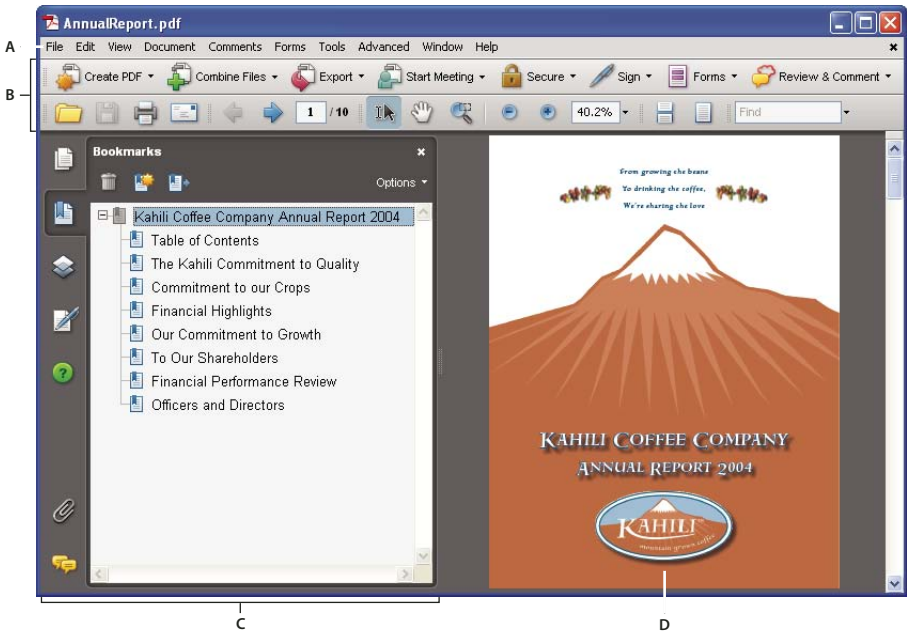
"Document message bar" on page 17

"Navigation areas for PDF packages" on page 17

### View the work area for PDFs open in the application

**1** Click the Acrobat icon on the desktop, or use the Start menu (Windows) or Finder (Mac OS) to start the Acrobat application.

**2** Choose File > Open, navigate to and select any PDF on your computer, and click Open.




*Acrobat window*
***A.*** *Menu bar* ***B.*** *Toolbars* ***C.*** *Navigation pane (Bookmarks panel displayed)* ***D.*** *Document pane*

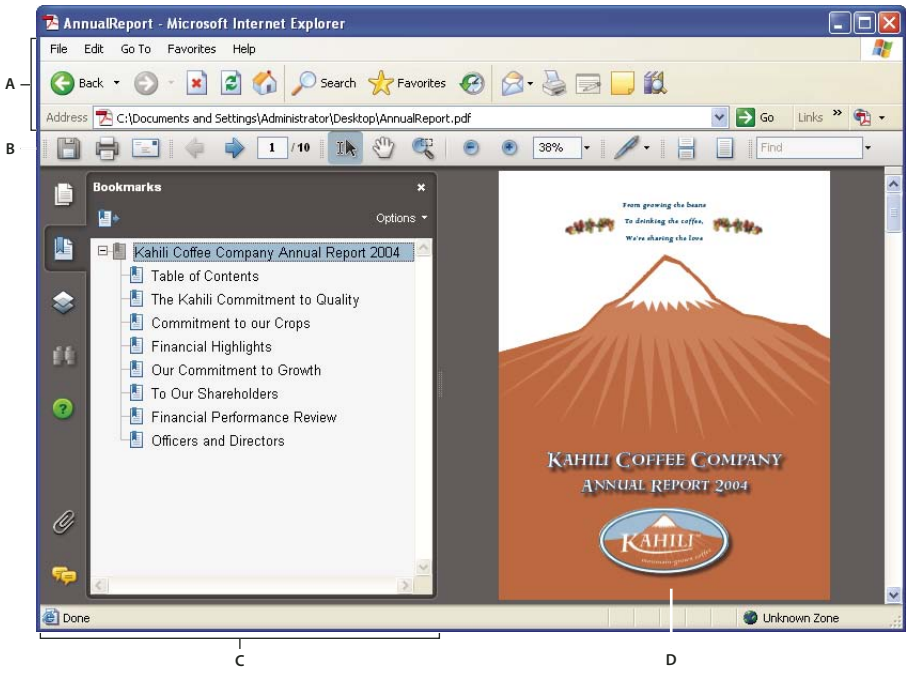
### View the work area for PDFs open in a web browser

**1** Open a web browser application.

**2** Do one of the following:

- Select a PDF anywhere on the Internet and open it.
- Choose File > Open (or Open File). If necessary, choose PDF or All Files in the pop-up menu for the type of file. Then navigate to and select any PDF on your computer or local network, and click Open.

**3** Identify items in the work area.




*PDF open within a web browser*
***A.*** *Web browser application menu bar and buttons* ***B.*** *Acrobat toolbars* ***C.*** *Navigation pane (Bookmarks panel displayed)* ***D.*** *Document pane*

## Opening PDFs

You can open a PDF in many ways: from within the Acrobat application, from your email application, from your file system, or on a network from within a web browser. The initial view of the PDF depends on how its creator set the document properties. For example, a document may open at a particular page or magnification.

Some PDFs are restricted and open only after you enter a password provided to you by the PDF owner. If a document is encrypted, you may need the permission of its creator to open it. In the case of some restricted or certified documents, you may be prevented from printing a file or copying information to another application. If you have trouble opening a PDF or can't use certain features, contact its author or owner.

If a document is set to open in Full Screen mode, the toolbar, command bar, menu bar, and window controls are not visible. You can quit Full Screen mode by pressing the Esc key if your preferences are set this way, or by pressing Ctrl+L/Command+L.

### See also

"Defining initial view as Full Screen mode" on page 271

"Navigation areas for PDF packages" on page 17

"Open secured PDFs" on page 195

## Select another tool

By default, the Select tool is active when Acrobat opens, because it is the most versatile tool.

Specialized tools, such as those for zooming in or adding review comments, are available in toolbars and in the Tools menus.

### Select a tool

❖ Do one of the following:

- Select a tool in a toolbar.
- Choose Tools > [*toolbar name*] > [*tool*].

### Switch temporarily to the Zoom In or Hand tool

You can use these tools temporarily, without deselecting the current tool.

- To select the Hand tool temporarily, hold down the spacebar.
- To select the Zoom In tool temporarily, hold down Ctrl+spacebar/Command+spacebar.

When you release the keys, Acrobat reverts to the previously active tool.

## Document message bar

The document message bar appears only in certain types of PDFs. Typically, you see this area when you open a PDF form, a PDF that has been sent to you for review, or a PDF with special rights or security restrictions. The document message bar appears immediately below the toolbar area, and can be hidden or shown by clicking its button on the left side of the work area.

Look on the document message bar for instructions on how to proceed and for any special buttons associated with the task. The bar is color coded: purple for forms, yellow for reviews, and blue for certified or secure PDFs.




*Document message bar for a form*

### See also

"Filling in PDF forms" on page 186

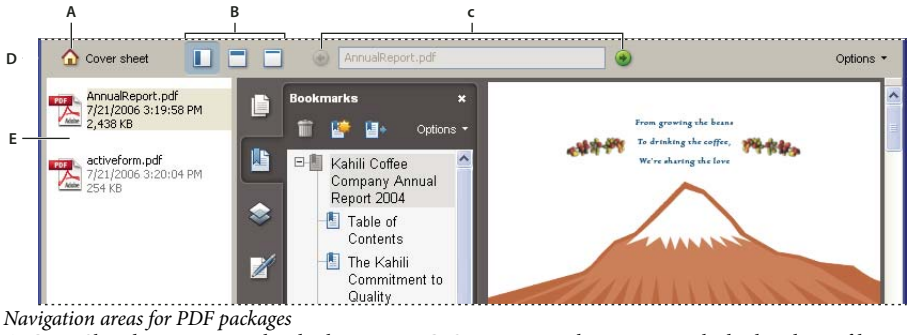
"Commenting" on page 158

## Navigation areas for PDF packages

When you open a PDF package, two unique areas appear:

**PDF package navigation bar** Located immediately below the toolbars area. Look here for the Cover Sheet button, buttons that hide or set the orientation of the list of component documents, buttons for moving to the next or previous component document, and an Options menu with commands for viewing, editing, and using the PDF package.

**List of component documents** By default, located between the PDF package navigation bar and the document pane, but can be hidden or displayed vertically, to the left of the navigation pane. Selecting a component file in the list opens it in the document pane.




*Navigation areas for PDF packages*
***A.*** *Cover Sheet button* ***B.*** *PDF list display options* ***C.*** *Open Previous button, currently displayed PDF filename, Open Next button* ***D.*** *PDF package navigation bar* ***E.*** *List of component PDFs (shown vertically)*

### See also

"About PDF packages" on page 112

"View, sort, and search components in a PDF package" on page 26

## Start in the Getting Started window

The Getting Started window opens by default when you start Acrobat. The home page in this window contains links that open additional pages. All Getting Started pages include buttons and links that start specific tasks or display topics in the full Acrobat Help system (which you are reading now).

You can open or close the Getting Started window, or simply let it remain open behind or beside the Acrobat work area.

#### Start a task from the Getting Started window

1 On the Getting Started home page, select a task group, such as Create PDF or Review & Comment.

2 Start a task or view a Help topic:

- Click an action text link or button to initiate a task.
- Click an information text link or button to open full Acrobat Help to the related Help topic.

If you decide to try a different task group, click Home in the upper-left corner to return to the Getting Started home page.

#### Reopen and reset the Getting Started window

1 Choose Help > Getting Started With Adobe Acrobat®.

2 Deselect the Do Not Show At Startup option in the upper-right corner.

# Customizing the work area

## Displaying menus

Ordinarily, it's a good idea to keep the Acrobat menus visible so that they are available as you work. It is possible to hide them, using the View > Menu Bar command. However, the only way to display and use them again is by pressing F9/Shift+Command+M.

Acrobat also has numerous context-sensitive menus. These menus appear when you right-click/Control-click an element in the work area or PDF that has such a menu associated with it. A context menu displays commands that relate to the item or area that you clicked. For example, when you right-click/Control-click the toolbar area, that context menu displays the same commands as the View > Toolbars menu.

***Note:*** *The Acrobat menu bar appears only if Acrobat is open as a stand-alone application. If Acrobat is open within the browser, only the browser application menu appears at the top of the window. However, context menus are available in both cases.*

## About toolbars

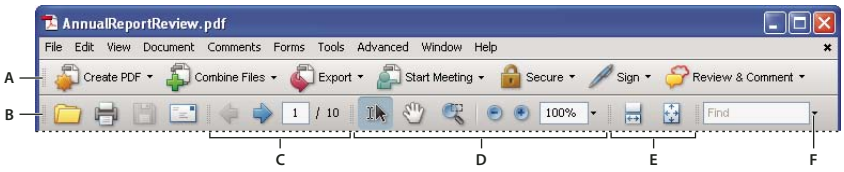
Toolbars reduce clutter in the work area by arranging tools in task-related groups. For example, the Page Display toolbar includes buttons for changing how many pages you can see at a time in the document window. The Comment & Markup toolbar contains tools for reviewing and annotating a PDF.

Any toolbar can *float* or be *docked*. Docked toolbars appear in the toolbar area. Floating toolbars appear as independent panels that you can move anywhere in the work area.

Each toolbar has a *grabber bar*, which is a vertical gray stripe at the left end of the toolbar.

- When you position the pointer over a grabber bar, a tool tip displays the name of the associated toolbar.
- When you drag a grabber bar, the toolbar moves. You can drag toolbars off the toolbar area (so that they float), dock them in the toolbar area, or rearrange them in the toolbar area.

Some toolbars appear by default and some are hidden.




*Toolbars open by default*
***A.*** *Tasks toolbar* ***B.*** *File toolbar* ***C.*** *Page Navigation toolbar* ***D.*** *Select & Zoom toolbar* ***E.*** *Page Display toolbar* ***F.*** *Find toolbar*

Buttons in the Tasks toolbar behave somewhat differently from other toolbar buttons. Each of these buttons is associated with a menu of commands. Click the arrow to the right of the button name to open the menu. For example, click the arrow next to the Start Meeting button to display a menu of commands related to Adobe Acrobat Connect meetings.

*Position the pointer over a tool to see a description of the tool. Position the pointer over the grabber bar on the left edge of a toolbar to see its name. All tools are identified by name in the More Tools dialog box (Tools > Customize Toolbars).*

### See also

"Customizing the work area" on page 18

"Displaying menus" on page 18

## Display and arrange toolbars

When your work does not involve using the tools in a toolbar, you can close the toolbar to tidy up the work area. For example, if you are not adding review comments to a PDF, there's no need to have the Comment & Markup toolbar open.

When you need easy access to a toolbar that is hidden by default, you can open it. This toolbar appears as a floating panel, which you can move or dock in the toolbar area.

***Note:*** *If several PDFs are open, you can customize the toolbars for each PDF independently. The different customized states persist as you switch between PDFs.*

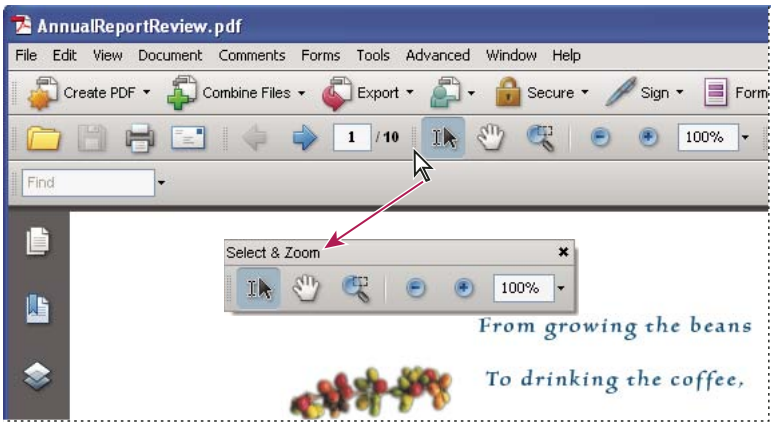
### Show or hide toolbars

- To open a toolbar, choose View > Toolbars > [*toolbar name*]. A check mark next to the toolbar name indicates that the toolbar is displayed.
- To hide all toolbars, choose View > Toolbars > Hide Toolbars.
- To change a toolbar that is either shown or hidden, right-click/Control-click the toolbar area, and choose the toolbar you want to show or hide.
- To change the visibility of several toolbars, choose Tools > Customize Toolbars or View > Toolbars > More Tools. Then, select and deselect toolbars. (Check marks by the toolbar names indicate which ones are currently visible.)

***Note:*** *Whether a new toolbar opens as a floating toolbar or docked in the toolbar area depends on its default position or where it appeared in your previous configuration of the work area, if any.*

### Move toolbars

- To rearrange the docked toolbars, use the toolbar grabber bars to drag them from one position to another.
- To move a floating toolbar, drag it by its title bar or grabber bar to another location in the work area.
- To float a docked toolbar, drag it by its grabber bar from the toolbar area.




*Use the title bar to move a section of tools from the toolbar area.*

- To dock a floating toolbar, drag it by its title bar or grabber bar to the toolbar area.
- To move all floating toolbars to the toolbar area, choose View > Toolbars > Dock Toolbars.

Rows may be added to or removed from the toolbar area as you move the toolbars in and out.

### Return toolbars to their default configuration

❖ Choose View > Toolbars > Reset Toolbars.

#### Lock or unlock the toolbar area

Locking the toolbars prevents any rearrangement of the toolbar area, so all grabber bars disappear when the toolbar area is locked. Locking does not affect the positions of any floating toolbars.

❖ Choose View > Toolbars > Lock Toolbars.

Select the command a second time to unlock the toolbar area.

***Note:*** *When the toolbar area is locked, you can still move floating toolbars by dragging them by their title bars. However, you can't dock them unless you unlock the toolbar area.*

## About the Properties toolbar

The Properties toolbar looks like any other toolbar and can be moved, docked, or floated in the same way. It also contains buttons and can be hidden or displayed by choosing it by name from the View > Toolbars menu.

The buttons in the Properties toolbar display properties of the currently selected tool or object. Unlike buttons in most toolbars, the buttons in the Properties toolbar can't be hidden. Also, many of the buttons merely display information, so you cannot use them to make changes to the PDF.

## Show and hide toolbar elements

You can alter the display within an individual toolbar to keep just the tools you need available with a minimum of wasted space. You can also show and hide tool labels.

#### Show or hide individual tools

Acrobat includes more tools and more toolbars than the set that appears by default. You can customize the toolbars so that the tools you use most often appear in the toolbar area.

❖ Do any of the following:

- Right-click/Control-click the toolbar, and select a tool that you want to display or deselect a tool that is already displayed if you want to hide it.
- Right-click/Control-click any toolbar and choose More Tools. Then select individual tools and toolbars that you want to display, and deselect those that you want to hide.

***Note:*** *A selected tool appears in the toolbar area only if its toolbar is also selected in the More Tools dialog box.*

#### Show or hide tool labels

The default view shows labels for some toolbar buttons. You can show labels for all buttons to help you as you learn to use Acrobat, or you can hide all tool labels to save space in the toolbar area.

❖ Choose View > Toolbars > Button Labels > *[option]*.

***Note:*** *Tool labels are turned off selectively when space in the toolbar area becomes limited.*

## Review properties for tools and objects

The Properties toolbar provides easy access to the properties for many tools and objects such as links, comments, form fields, media clips, and bookmarks. For example, if you select the Note tool, the Properties toolbar displays the current default properties for that tool. If you select a note in the document, the Properties toolbar displays properties for that note.

You can use the Properties toolbar to change many of the settings that appear there. A few items only provide information and cannot be edited.

Like all toolbars, the Properties toolbar can float or be docked in the toolbar area. The Properties toolbar is different in that it doesn't contain tools and can't be customized to hide options.

1 Do one of the following:

- Choose View > Toolbars > Properties Bar.
- Right-click/Control-click the toolbar area, and choose Properties Bar from the context menu.

2 Select the object or tool that you want to review.

3 Change properties for the selected item, as desired.

*If you want to change object properties other than those listed in the Properties toolbar, right-click/Control-click the object, and choose Properties.*

## Show or hide the navigation pane

The navigation pane is an area of the work space that can display different navigation panels. Typically, these panels act like a table of contents, with items you can click to jump to a specific place in the document. For example, the Pages panel contains thumbnail images of each page; clicking a thumbnail opens that page in the document.

When you open a PDF, the navigation pane is closed by default, but buttons along the left side of the work area provide easy access to various panels, such as the Pages panel button and the Bookmarks panel button. When Acrobat is open but empty (no PDF is open), the navigation pane is unavailable.

1 To open the navigation pane, do one of the following:

- Click any panel button on the left side of the work area to open that panel.
- Choose View > Navigation Panels > Show Navigation Pane.

2 To close the navigation pane, do one of the following:

- Click the button for the currently open panel in the navigation pane.
- Choose View > Navigation Panels > Hide Navigation Pane.

***Note:*** *The creator of the PDF can control the contents of some navigation panels and may make them empty.*

## Adjust navigation panels

Like toolbars, navigation panels can be docked in the navigation pane, or they can float anywhere in the work area. You can hide or close panels you don't need and open the ones you do. You can also adjust the width of the navigation pane.

### Change the display area for navigation panels

- To change the width of the navigation pane, drag its right border.
- To collapse a floating panel without closing it, click the tab name at the top of the window. Click the tab name again to restore the panel to its full size.

### Change the orientation of a docked navigation panel

By default, some panels, such as Bookmarks, appear in a column on the left side of the work area. Others, such as the Comments panel, appear horizontally across the bottom of the document pane. You can change the orientation of any panel to either vertical or horizontal by dragging the button for that panel, which appears on the left side of the work area.

- To orient the panel vertically, drag its button to the upper part of the navigation pane, near the buttons of other vertically oriented panels.

- To orient the panel horizontally, drag its button to the lower part of the navigation pane, near the buttons of other horizontally oriented panels.

In either case, a gray frame highlights the entire panel buttons area. If you release the mouse button before the area is highlighted, the panel will float above the work area. If that happens, try again by dragging the panel tab into the upper or lower part of the button area.

### View a different panel in the navigation pane

By default, only a selected set of panel buttons appears on the left side of the work area. Other panels are included in the View menu and may open as floating panels rather than in the navigation pane. However, you can dock the panel in the navigation pane later.

❖ Do one of the following:

- On the left side of the navigation pane, select the button for the panel.
- Choose View > Navigation Panels > [*panel name*].

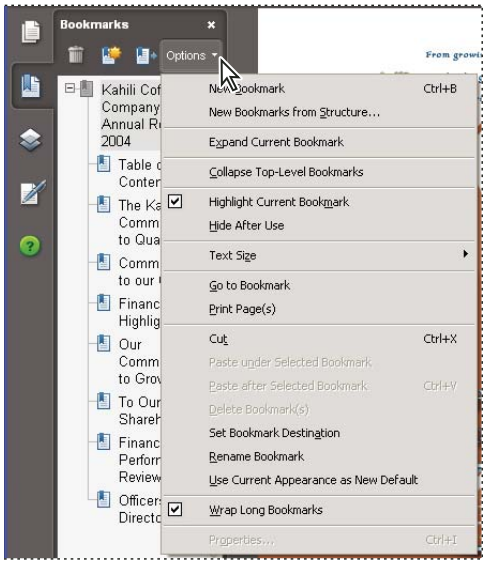
### Dock or float navigation panels

- To float a panel that is docked in the navigation pane, drag the panel button into the document pane.
- To dock a floating panel, drag the tab to the navigation pane.
- To group two floating panels, drag the tab of one panel into the other floating panel.

## Options in a navigation panel

All navigation panels have an Options menu in the upper-right corner. The commands available in these menu vary.

Some panels also contain other buttons that affect the items in the panel. Again, these vary among the different panels, and some panels have none.




*Click Options to open the menu.*

# Viewing PDF pages

## Open a PDF

You can open a PDF from within the Acrobat application, from the desktop, or from within certain other applications.

### Open a PDF in the application

❖ Start Acrobat and do one of the following:

- Choose File > Open, or click the Open button in the toolbar. In the Open dialog box, select one or more filenames, and click Open. PDF documents usually have the extension .pdf.
- (Windows) Choose File > [*a previously opened PDF*].
- (Mac OS) Choose File > Open Recent File > [*a previously opened PDF*].
- From either the File > Organizer submenu or the Organizer button menu on the File toolbar, choose Collections > [*collection name*] > [*PDF filename*].
- From the File menu or the Organizer button menu on the File toolbar, choose History > [*time period*] > [*PDF filename*].

*If more than one document is open, you can switch between documents by choosing the document name from the Window menu. In Windows, the application places a button for each open document on the Windows taskbar. You can click this button to move between open documents.*

### Open a PDF from the desktop or within another application

❖ Do one of the following:

- To open a PDF attached to an email message, open the message, either by double-clicking the PDF icon or right-clicking/Control-clicking and choosing Open.
- To open a PDF linked to an open web page, click the PDF file link. The PDF usually opens in the web browser.
- Double-click the PDF File icon in your file system.

***Note:*** *In Mac OS, you may not be able to open a PDF created in Windows by double-clicking the icon. Instead, choose File > Open With > Acrobat.*

## Opening pages in a PDF

Depending on the PDF you open, you may need to move forward through multiple pages, see different parts of the page, or change the magnification. There are many ways to navigate, but the following items are commonly used:

***Note:*** *If you do not see these items, choose View > Toolbars > Reset Toolbars.*

**Next and Previous** The Next Page and Previous Page buttons appear on the Page Navigation toolbar. The text box next to them is also interactive, so you can type a page number and press Enter to go directly to that page.

**Scroll bars** Vertical and horizontal scroll bars appear to the right and bottom of the document pane whenever the view does not show the entire document. Click the arrows or drag to view other pages or different areas of the page.

**Select & Zoom toolbar** This toolbar contains buttons and controls for changing the page magnification.

**Pages panel** The Pages button on the left side of the work area opens the navigation pane to the Pages panel, which displays thumbnail images of each page. Click a page thumbnail to open that page in the document pane.

### See also

"Retrace your viewing path" on page 28

"Adjust page magnification" on page 36

## Page through a document

There are many ways to turn pages in a PDF. Many people use the buttons on the Page Navigation toolbar, but you can also use arrow keys, scroll bars, and other features to move forward and backward through a multipage PDF.

The Page Navigation toolbar opens by default. The default toolbar contains frequently used tools: the Next Page, Previous Page, and Page Number. Like all toolbars, the Page Navigation toolbar can be hidden and reopened by choosing it on the Toolbars menu under the View menu. You can display additional tools on the Page Navigation toolbar by right-clicking/Control-clicking the toolbar and choosing an individual tool, Show All Tools, or More Tools and then selecting and deselecting tools in the dialog box.

### See also

"About bookmarks" on page 251

"About page thumbnails" on page 249

"Set the page layout and orientation" on page 39

#### Move through a PDF

❖ Do one of the following:

- Click the Previous Page or Next Page button on the toolbar.
- Choose View > Go To > [*location*].
- Choose View > Go To > Page, and then type the page number in the Go To Page dialog box.
- Press the Page Up and Page Down keys.

#### Jump to a specific page

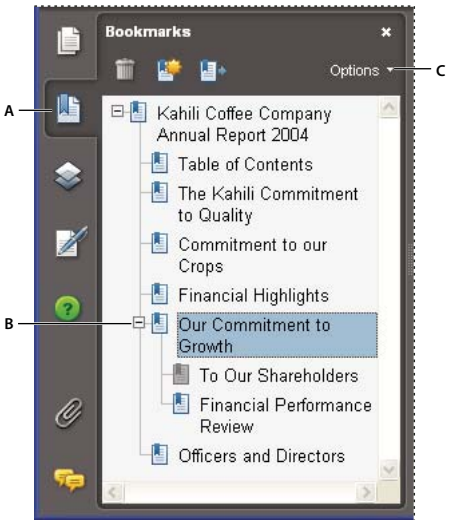
❖ Do one of the following:

- Drag the vertical scroll bar until the page appears in the small pop-up display.
- Type the page number to replace the one currently displayed in the Page Navigation toolbar, and press Enter or Return.

***Note:*** *If the document page numbers are different from the actual page position in the PDF file, the page's position within the file appears in parentheses after the assigned page number in the Page Navigation toolbar. For example, if you assign numbering for a file that is an 18-page chapter to begin with page 223, the number shown when the first page is active is 223 (1 of 18). You can turn off logical page numbers in the Page Display preferences. See "Renumber pages" on page 130 and "Preferences for viewing PDFs" on page 32.*

#### Jump to bookmarked pages

Bookmarks provide a table of contents and usually represent the chapters and sections in a document. Bookmarks appear in the navigation pane.




*Bookmarks panel*
***A.** Bookmarks button **B.** Expanded bookmark **C.** Click to display bookmark Options menu.*

**1** Click the Bookmarks button, or choose View > Navigation Panels > Bookmarks.

**2** To jump to a topic, click the bookmark. Click the plus (+) or minus (-) sign to expand or collapse the bookmark contents.

***Note:** Depending on how the bookmark was defined, clicking it may not take you to that location but perform some other action instead.*

If the list of bookmarks disappears when you click a bookmark, click the Bookmarks button to display the list again. If you want to hide the Bookmarks button after you click a bookmark, select Hide After Use on the Options menu.

#### Use page thumbnails to jump to specific pages

*Page thumbnails* provide miniature previews of document pages. You can use thumbnails in the Pages panel to change the display of pages and to go to other pages. The red page-view box in the page thumbnail indicates which area of the page appears. You can resize this box to change the zoom percentage.

**1** Click the Pages button or choose View > Navigation Panels > Pages to display the Pages panel.

**2** To jump to another page, click its thumbnail.

## View, sort, and search components in a PDF package

Both Adobe Reader users and Acrobat users can view, sort, and search component files in a PDF package.

***Note:** You can dramatically increase the speed of searches by creating an embedded index when you create a PDF package.*

### See also

"Searching PDFs" on page 281

### View component PDFs in a PDF package

The PDF package navigation bar contains buttons that control the visibility and placement of the list of component files. If the list is hidden, the View Top button or View Left button will make the list visible either horizontally or vertically adjacent to the document pane.

**1** Open the PDF package in Acrobat.

**2** In the PDF package navigation bar, select the View Left or View Top button, as needed, so that you can see the list of component PDFs.

**3** Select the PDF you want to read. Or, use the Open Next and Open Previous buttons to review the component PDFs one by one.

### Sort the components of a PDF package

Because the data categories are shown in columns in View Top mode, use that view to complete this procedure.

**1** In the PDF package navigation bar, select the View Top button, if necessary, so that you can see the list of component PDFs and the categories bar across the top of the list.

**2** Do any of the following:

- Click a category name. Click it a second time to reverse the order between Ascending and Descending.
- In the PDF package navigation bar, choose Options > Sort By > [*category name*].
- Right-click/Control-click a PDF in the list or anywhere in the categories bar and choose Sort By > [*category name*].
- Right-click/Control-click a PDF in the list or anywhere in the categories bar and choose Package Properties. Then choose options in the Sort By and Sort Order menus. (This sets the default sorting for the PDF package.)

***Note:*** *Unless you change the default sorting for the PDF package, the sorting remains in place for only the current session or until you change the sorting again. The next time you open the PDF package, it will appear in the default sorting order.*

### Search component PDFs in a PDF package

**1** Choose Edit > Search, or choose Open Full Acrobat Search on the Find toolbar pop-up menu.

**2** Select which PDFs to search. You can search only the currently open document, several documents that you select, or all the PDFs in the package.

**3** Enter the search text and select other options for searching, as usual.

## Automatically scroll through a document

Automatic scrolling advances your view of the PDF at a steady rate, moving vertically down the document. If you interrupt the process by using the scroll bars to move back or forward to another page or position, automatic scrolling continues from that point forward. At the end of the PDF, automatic scrolling stops and does not begin again until you choose automatic scrolling again.

**1** Choose View > Automatically Scroll.

**2** Press Esc to stop scrolling.

## Retrace your viewing path

You can find PDF pages that you viewed earlier by retracing your viewing path. It's helpful to understand the difference between previous and next pages and previous and next views. In the case of pages, previous and next refer to the two adjacent pages, before and after the currently active page. In the case of views, previous and next refer to your viewing history. For example, if you jump forward and backward in a document, your viewing history retraces those steps, showing you the pages you viewed in the reverse order that you viewed them.

### Retrace your path in a PDF

**1** Choose View > Go To > Previous View.

**2** To continue seeing another part of your path, do either of the following:

- Repeat step 1.
- Choose View > Go To > Next View.

***Note:*** *You can make the Previous View button and Go To Next View button available in the toolbar area by right-clicking/Control-clicking the Page Navigation toolbar and choosing them on the context menu, or choosing Show All Tools.*

### Retrace your path through multiple PDFs

❖ Choose View > Go To > Previous Document or Next Document. These commands open the other PDF documents if the documents are closed.

***Note:*** *If Acrobat is open in a web browser, you can use the web browser's Back and Forward options as usual to retrace your steps.*

## Change the PDF/A viewing mode

PDF/A is an ISO standard for PDFs. Documents you scan to PDF are PDF/A-compliant. You can specify when and whether you want to view documents in this viewing mode.

**1** Choose Edit > Preferences (Windows) or Acrobat> Preferences (Mac OS).

**2** Select Documents under Categories.

**3** Choose an option for View Documents In PDF/A: Never, Always, or Only For PDF/A Documents.

You can switch in or out of PDF/A viewing mode by changing this preference setting again.

## Navigate with links

Links can take you to another location in the current document, to other PDF documents, or to websites. Clicking a link can also open file attachments and play 3D content, movies, and sound clips. To play these media clips, you must have the appropriate hardware and software installed.

The person who created the PDF document determines what links look like in the PDF.

***Note:*** *Unless a link was created in Acrobat using the Link tool, you must have the Automatically Detect URLs From Text option selected in the General preferences for a link to work correctly.*

**1** Choose the Select tool .

**2** Position the pointer over the linked area on the page until the pointer changes to the hand with a pointing finger. A plus sign (+) or a *w* appears within the hand if the link points to the web. Then click the link.

### See also

"Links and attachments" on page 255

"Multimedia preferences" on page 288

## PDFs with file attachments

If you open a PDF that has one or more attached files, the Attachments panel automatically opens, listing the attached files. You can open these files for viewing, edit the attachments, and save your changes, as permitted by the document authors.

If you move the PDF to a new location, the attachments automatically move with it.

### See also

"Open, save, or delete an attachment" on page 259

## Open or close reading mode

The reading mode view hides everything in the work area except the document and the menu bar.

❖ Choose View > Reading Mode.

Choosing Reading Mode again restores the work area to its previous view, with the same navigation buttons and toolbar displays.

## View PDFs in Full Screen mode

In Full Screen mode, PDF pages fill the entire screen; the menu bar, toolbars, and window controls are hidden. A PDF creator can set a PDF to open in Full Screen mode, or you can set the view yourself. Full Screen mode is often used for presentations, sometimes with automatic page advancement and transitions.

The pointer remains active in Full Screen mode so that you can click links and open notes. There are two ways to advance through a PDF in Full Screen mode: You can use keyboard shortcuts for navigational and magnification commands, and you can set a Full Screen preference to display Full Screen navigation buttons that you click to change pages or exit Full Screen mode.

### See also

"Preferences for viewing PDFs" on page 32

"Setting up a presentation" on page 271

#### Set the Full Screen navigation bar preference

1 Choose Edit > Preferences.

2 Under Categories, select Full Screen.

3 Select Show Navigation Bar.

4 Select View > Full Screen Mode.

The Full Screen navigation bar contains Previous Page , Next Page , and Close Full Screen View  buttons, which appear in the lower left corner of the work area.

### Read a document in Full Screen mode

If the Full Screen navigation bar is not shown, you can use keyboard shortcuts to navigate through a PDF.

***Note:*** *If you have two monitors installed, the Full Screen mode of a page may appear on only one of the monitors. To page through the document, click the screen displaying the page in Full Screen mode.*

**1** Choose View > Full Screen Mode.

**2** Do any of the following:

- To go to the next page, press the Enter, Page Down, or Right Arrow key.
- To go to the previous page, press Shift+Enter, Page Up, or the Left Arrow key.
- To change the magnification, press Ctrl+0/Command+0 for Fit Page view, Ctrl+1/Command+1 for actual size, Ctrl+2/Command+2 for Fit Width view, or Ctrl+3/Command+3 for Fit Visible view.

*You can show a Full Screen tool on the Page Display toolbar by right-clicking/Control-clicking the Page Display toolbar and choosing Full Screen Mode. Then, you can click the Full Screen tool to switch to Full Screen mode.*

### Close Full Screen mode

❖ Do one of the following:

- Press Ctrl+L/Command+L.
- Press Esc. (Escape Key Exits must be selected in the Full Screen preferences. This is the default setting.)

## Viewing PDFs in a web browser

You can view PDFs in a supported web browser, or you can set your Acrobat Internet preferences to open linked or downloaded PDF files in a separate Acrobat window. If you open PDFs in Acrobat outside the browser, you cannot use Fast Web Viewing, form submittal in a browser, or search highlighting on the web.

Because keyboard commands may be mapped to the web browser, some Acrobat shortcuts may not be available. Similarly, you may need to use the tools and commands in the Acrobat toolbar rather than the browser toolbar or menu bar. For example, to print a PDF document, use the Print button in the Acrobat toolbar rather than the Print command in the browser. (In Microsoft Internet Explorer, you can choose File > Print, Edit > Copy, and Edit > Find on the Internet Explorer toolbar.)

***Important:*** *(Mac OS) If you have Adobe Reader installed on your system and subsequently install Acrobat, Safari continues to use Adobe Reader to open PDFs in your browser. To reconfigure Safari to use Acrobat, you must quit Safari and all versions of Acrobat or Adobe Reader, start Acrobat, and then start Safari while Acrobat is running.*

### Internet preferences

To open the Internet preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Internet under Categories.

**Display PDF In Browser** Displays any PDF opened from the web in the browser window. If this option is not selected, PDFs open in a separate Acrobat window. On Mac OS, if you have installed versions of Adobe Reader and Acrobat, you can select which application and which version to use.

**Allow Fast Web View** Downloads PDFs for viewing on the web one page at a time. If this option is not selected, the entire PDF downloads before it is displayed. If you want the entire PDF to continue downloading in the background while you view the first page of requested information, also select Allow Speculative Downloading In The Background.

**Allow Speculative Downloading In The Background** Allows a PDF to continue downloading from the web, even after the first requested page appears. Downloading in the background stops when any other task, such as paging through the document, is initiated in Acrobat.

**Connection Speed** Choose a connection speed from the menu. This setting is also used by the multimedia plug-in.

**Internet Settings [or Network Settings]** Click to open the Internet or network connection dialog box or panel for your computer. For more information, consult your operating system Help, your Internet service provider, or your local network administrator.

## Read articles

In PDFs, *articles* are optional electronic threads that the PDF author may define within that PDF. Articles lead readers through the PDF content, jumping over pages or areas of the page that are not included in the article, in the same way that you might skim through a traditional newspaper or magazine, following one specific story and ignoring the rest. When you read an article, the page view may zoom in or out so that the current part of the article fills the screen.

### See also

"Articles" on page 264

#### Open and navigate an article thread

**1** Choose Tools > Select & Zoom > Hand Tool, or click the Hand Tool on the Select & Zoom toolbar.

**2** Choose View > Navigation Panels > Articles to open the Articles panel.

***Note:*** *You cannot open the Articles panel if you are viewing the PDF inside a browser. You must open the PDF in Acrobat.*

**3** Double-click the article icon to go to the beginning of that article. The icon changes to the follow-article pointer .

***Note:*** *If the Articles panel is blank, then the author has not defined any article threads for this PDF.*

**4** With the article thread open, do any of the following:

- To scroll through the article one pane at a time, press Enter/Return or click in the article.
- To scroll backward through the article one pane at a time, Shift-click in the article, or press Shift+Return.
- To go to the beginning of the article, Ctrl-click/Option-click within the article.

**5** At the end of the article, click in the article again.

The previous page view is restored, and the pointer changes to the end-article pointer .

#### Exit a thread before the end of the article

**1** Make sure that the Hand tool is selected.

**2** Shift+Ctrl-click/Shift+Option-click the page or press Enter/Return.

The previous page view is restored.

## Preferences for viewing PDFs

The Preferences dialog box defines a default page layout and customizes your application in many other ways. To modify preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select the panel you want under Categories. For viewing PDFs, examine the preferences options for Documents, General, Multimedia, and Page Display.

The preferences settings control how the application behaves whenever you use it; they are not associated with any particular PDF document.

***Note:*** *If you install any third-party plug-ins, set these preferences using the Third-Party Preferences menu item.*

### See also

"3D preferences" on page 301

"Multimedia preferences" on page 288

"Setting accessibility preferences" on page 235

#### Documents preferences

**Open Settings**

**Show Each Document In Its Own Window** Creates multiple Acrobat windows rather than opening multiple PDFs in one instance of Acrobat.

**Restore Last View Settings When Reopening Documents** Determines whether documents open automatically to the last viewed page within a work session.

**Open Cross-document Links In Same Window** Closes the current document and opens the document being linked to in the same window, minimizing the number of windows open. If the document being linked to is already open in another window, the current document is not closed when you click a link to the open document. If you do not select this option, a new window opens each time you click a link to a different document.

**Allow Layer State To Be Set By User Information** Allows the author of a layered PDF document to specify layer visibility based on user information.

**Allow Documents To Hide The Menu Bar, Toolbars, And Window Controls** Allows the PDF to determine whether the menu bar, toolbar, and window controls are hidden when the PDF is opened.

**Documents In Recently Used List** Sets the maximum number of documents listed in the File menu (Windows) or when you choose File > Open Recent File (Mac OS). The default is five for Windows and nine for Mac OS.

**Remember Files In Organizer History For** Specifies how long PDF files remain in the History list.

**Save Settings**

**Automatically Save Document Changes To Temporary File Every _ Minutes** Determines how often Acrobat automatically saves changes to an open document.

**Save As Optimizes For Fast Web View** Restructures a PDF document for page-at-a-time downloading from web servers.

**PDF/A View Mode**

**View Documents In PDF/A Mode** Specifies when to use this viewing mode: Always, Never, or Only For PDF/A Documents.

### Examine Document

**Examine Document** Examines the PDF for items that may not be apparent, such as metadata, file attachments, comments, and hidden text and layers. The examination results appear in a dialog box, and you can remove any type of item that appears there.

- **Examine Document When Closing Document** (Not selected by default.)
- **Examine Document When Sending Document By Email** (Not selected by default.)

### Adobe Version Cue CS3

**Enable Version Cue File-Version Manager** Turns on Adobe Version Cue® CS3 (a feature of Adobe Creative Suite 3) and adds the Save A Version command and the Versions command to the File menu.

***Note:*** *To use Version Cue in Acrobat, you must be able to access a Version Cue Workspace in Creative Suite.*

## Full Screen preferences

### Full Screen Setup

**Current Document Only** Specifies whether or not the display is limited to a single PDF.

**Fill Screen With One Page At A Time** Sets the page view to the maximum screen coverage by a single page.

**Alert When Document Requests Full Screen** Displays a message before going into Full Screen mode. Selecting this option overrides a previous selection of Do Not Show This Message Again in that message.

**Which Monitor To Use** Specifies the monitor on which full-screen display appears (for users with multiple-monitor configurations).

### Full Screen Navigation

**Escape Key Exits** Lets you exit Full Screen mode by pressing the Esc key. If this option is not selected, you can exit by pressing Ctrl+L/Command+L.

**Show Navigation Bar** Shows a minimal navigation toolbar regardless of the document settings.

**Left Click To Go Forward One Page; Right Click To Go Back One Page** Lets you page through an Adobe PDF document by clicking the mouse. You can also page through a document by pressing Return, Shift-Return (to go backward), or the arrow keys.

**Loop After Last Page** Lets you page through a PDF document continuously, returning to the first page after the last. This option is typically used for setting up kiosk displays.

**Advance Every _ Seconds** Specifies whether to advance automatically from page to page every set number of seconds. You can page through a document using mouse or keyboard commands even if automatic paging is selected.

### Full Screen Appearance

**Background Color** Specifies the window's background color in Full Screen mode. You can select a color from the color palettet to customize the background color.

**Mouse Cursor** Specifies whether to show or hide the pointer when Full Screen mode is in operation.

### Full Screen Transitions

**Ignore All Transitions** Removes transition effects from presentations that you view in Full Screen mode.

**Default Transition** Specifies the transition effect to display when you switch pages in Full Screen mode and no transition effect has been set for the document.

**Direction** Determines the flow of the selected default transition on the screen, such as Down, Left, Horizontally, and so forth. The available options vary according to the transition. If no directional options affect the selected default transition, this option is not available.

**Navigation Controls Direction** Mimics the user's progress through the presentation, such as transitioning from top to bottom when the user proceeds to the next page and from bottom to top when the user backtracks to the previous page. Available only for transitions with directional options.

### General preferences

#### Basic Tools

**Use Single Key Accelerators To Access Tools** Enables you to select tools with a single keystroke. This is off by default.

**Create Links From URLs** Specifies whether links that weren't created with Acrobat are automatically identified in the PDF document and become clickable links.

**Make The Hand Tool Select Text** Enables the Hand tool to function as the Select tool when it hovers over text in an Adobe PDF.

**Make The Hand Tool Read Articles** Changes the appearance of the Hand tool pointer when over an article thread. Upon the first click, the article zooms to fill the document pane horizontally; subsequent clicks follow the thread of the article.

**Make The Hand Tool Use Mouse-wheel Zooming** Changes the action of the mouse wheel from scrolling to zooming.

**Make The Select Tool Select Images Before Text** Changes the order in which the Select tool selects.

**Use Fixed Resolution For Snapshot Tool Images** Sets the resolution used to copy an image captured with the Snapshot tool.

#### Warnings

**Do Not Show Edit Warnings** Disables warning boxes that would normally appear when you delete items such as links, pages, page thumbnails, and bookmarks.

**Reset All Warnings** Restores default settings for warnings.

#### Print

**Show Page Thumbnails In Print Dialog** Controls the print preview display in the Print dialog box. Deselecting this option speeds up the preview.

**Emit Passthrough PostScript When Printing** Enables Adobe PostScript® XObjects in the PDF file to be emitted when that PDF file is printed to a PostScript printer.

#### Application Startup

**Show Splash Screen** Determines whether the application splash screen appears each time the application starts.

**Use Only Certified Plug-Ins** Ensures that only Adobe-certified third-party plug-ins are loaded.

### Page Display preferences

#### Default Layout And Zoom

#### Resolution

**Use System Setting** Uses the system settings for monitor resolution.

**Custom Resolution** Sets the monitor resolution.

#### Rendering

**Smooth Text** Specifies the kind of text-smoothing to apply: None, For Monitor, or For Laptop/LCD.

**Smooth Line Art** Applies smoothing to remove abrupt angles in lines.

**Smooth Images** Applies smoothing to minimize abrupt changes in images.

**Use Local Fonts** Specifies whether the application uses or ignores local fonts installed on your system. When deselected, substitute fonts are used for any font not embedded in the PDF. If a font cannot be substituted, the text appears as bullets and an error message appears.

**Use 2D GPU Acceleration** (Appears only if your computer hardware supports 2D GPU acceleration.) Speeds up zooming, scrolling, and redrawing of page content, and speeds the rendering and manipulation of 2D PDF content. This option is deselected by default.

***Note:*** *If the 2D GPU Acceleration option appears on the Page Display preferences but is not available, you may need to update your GPU card driver to enable this hardware feature. Contact your card vendor or computer manufacturer for an updated driver.*

**Use Page Cache** Places the next page in a buffer before the current page is viewed to reduce the time required to page through a document.

#### Page Content And Information

**Show Large Images** Displays large images. If your system is slow to display image-intensive pages, you can deselect this option.

**Overprint Preview** Turns overprint preview on or off. The Overprint Preview mode lets you see (on-screen) the effects of ink aliasing in the printed output. A printer or service provider may create an ink alias if a document contains two similar spot colors and only one is required, for example.

**Show Art, Trim, & Bleed Boxes** Displays any art, trim, or bleed boxes defined for a document.

**Show Transparency Grid** Displays the grid behind transparent objects.

**Use Logical Page Numbers** Enables the Number Pages command for matching the position of the page in the PDF to the number printed on the page. A page number, followed by the page position in parentheses, appears in the Page Navigation toolbar and in the Go To Page and Print dialog boxes—for example, i (1 of 1) if the printed number of the first page is i. If this option is not selected, pages are numbered with arabic numbers starting at 1. Selecting this option helps prevent unexpected behavior when clicking Back or Go Back in your web browser.

**Always Show Document Page Size** Displays the page measurements beside the horizontal scroll bar.

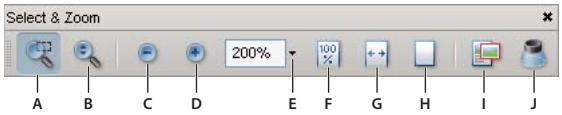
**Use Smooth Zooming** When deselected, turns off animation effects, which improves performance.

**Use Smooth Scrolling** When deselected, turns off animation effects, which improves performance.

# Adjusting PDF views

## Adjust page magnification

Tools on the Select & Zoom toolbar can change the magnification of PDF documents. Only some of these tools appear on the default view of the toolbar. You can see all the tools by right-clicking/Control-clicking the Select & Zoom toolbar and choosing either individual tools, Show All Tools, or More Tools and then selecting individual tools.




*All zoom tools*
***A.*** *Marquee Zoom tool* ***B.*** *Dynamic Zoom tool* ***C.*** *Zoom Out button* ***D.*** *Zoom In button* ***E.*** *Zoom Value menu button* ***F.*** *Actual Size button* ***G.*** *Fit Width button* ***H.*** *Fit Page button* ***I.*** *Pan & Zoom Window tool* ***J.*** *Loupe tool*

- The Marquee Zoom tool works in a few different ways. You can use it to drag a rectangle around a portion of the page that you want to fill the viewing area. Or, simply clicking the Marquee Zoom tool increases the magnification by one preset level, centering on the point where you clicked. To decrease the magnification by one preset level, Ctrl-click/Option-click the Marquee Zoom tool.
- The Dynamic Zoom tool zooms in when you drag it up the page and it zooms out when you drag down. If you use a mouse wheel, this tool zooms in when you roll forward and zooms out when you roll backward.
- Zoom In and Zoom Out buttons change the document magnification by preset levels.
- The Zoom Value option changes the page view according to a percentage you type in or select from a pop-up menu.
- Actual Size displays the page at 100% magnification.
- Fit Width adjusts the magnification so that the PDF fills the document pane horizontally.
- Fit Page adjusts the magnification so that one page fills the document pane vertically.
- The Pan & Zoom Window tool adjusts the magnification and position of the view area to match the area in an adjustable rectangle in the Pan & Zoom window's thumbnail view of the page.
- The Loupe Tool window displays a magnified portion of the PDF that matches the area in an adjustable rectangle on the document pane.

### Resize a page to fit the window

- To resize the page to fit entirely in the document pane, choose View > Zoom > Fit Page.
- To resize the page to fit the width of the window, choose View > Zoom > Fit Width. Part of the page may be out of view.
- To resize the page to fit the height of the window, choose View > Zoom > Fit Height. Part of the page may be out of view.
- To resize the page so that its text and images fit the width of the window, choose View > Zoom > Fit Visible. Part of the page may be out of view.

*To see keyboard shortcuts for resizing the document, open the View menu.*

### Show a page at actual size

❖ Choose View > Zoom > Actual Size.

The actual size for a PDF page is typically 100%, but the document may have been set to another magnification level when it was created.

### Change the magnification with zoom tools

❖ Do one of the following:

- Click the Zoom In button or the Zoom Out button in the toolbar.
- Enter a magnification percentage in the Select & Zoom toolbar, either by typing or choosing from the pop-up menu.
- Drag the Marquee Zoom tool to define the area of the page that you want to fill the document pane.
- Drag the Dynamic Zoom tool up to increase the magnification and down to decrease magnification.

*When the Marquee Zoom tool is selected, you can Ctrl-click/Option-click or Ctrl-drag/Option-drag to zoom out. Holding down Shift switches temporarily from the Marquee Zoom tool to the Dynamic Zoom tool.*

### Change the magnification with the Pan & Zoom Window tool

**1** Choose Tools > Select & Zoom > Pan & Zoom Window, or select the Pan & Zoom Window tool on the Select & Zoom toolbar.

**2** Do any of the following:

- Drag the handles of the box in the Pan & Zoom window to change the document magnification.
- Drag the center of the box to pan across the area you want to see.
- Click the navigation buttons to move to a different page.
- Enter a value in the zoom text box, or click the plus or minus buttons to increase or decrease the magnification by preset levels.

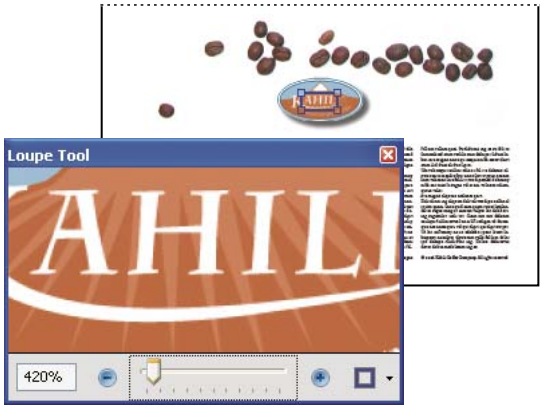
### Change the magnification with the Loupe tool

**1** Choose Tools > Select & Zoom> Loupe, or select the Loupe tool on the Select & Zoom toolbar, if it is displayed.

**2** Click the area of the document you want to view in closer detail. A rectangle appears in the document, corresponding to the area shown in the Loupe Tool window. You can drag or resize the rectangle to change the Loupe tool view.

**3** To change the magnification of the Loupe tool, do any of the following:

- Drag the slider.
- Click the plus or minus buttons.
- Enter a value in the zoom text box.




*Use the Loupe tool to view a magnified area of the document.*

***Note:*** *You can change the color of the Loupe tool rectangle, click the Line Color pop-up menu in the lower right corner of the Loupe Tool window, and select a new color.*

### Change the magnification by using a page thumbnail

**1** Click the Pages button on the left side of the window to view the page thumbnails.

**2** Locate the thumbnail for the current page, and then position the pointer over the lower right corner of the page-view box until the pointer changes into a double-headed arrow.

**3** Drag the corner of the box to reduce or expand the view of the page.

**4** As needed, move the pointer over the zoom box frame within the thumbnail until it changes to a Hand icon, and then drag the frame to see a different area of the page in the document pane.




*A page-view box in a page thumbnail indicates the area of the page currently showing in the document pane.*

### Change the default magnification

**1** Choose Edit > Preferences.

**2** Under Categories, select Page Display.

**3** Open the Zoom pop-up menu and choose a default magnification level.

## Set the page layout and orientation

Changing the page layout is especially useful when you want to zoom out to get an overview of the document layout. You can use the following page layouts when viewing PDF documents:

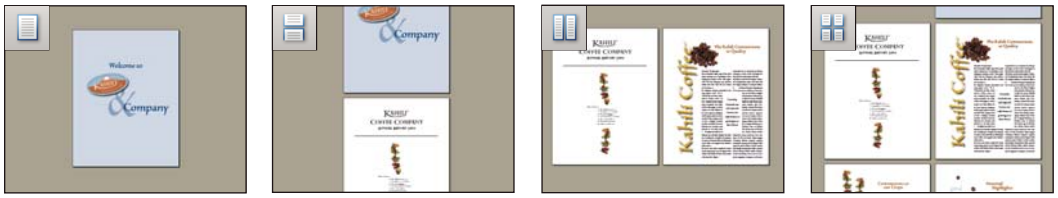
**Single Page** Displays one page at a time, with no portion on other pages visible.

**Single Page Continuous** Displays pages in a continuous vertical column that is one page wide.

**Two-Up** Displays each two-page spread with no portion of other pages visible.

**Two-Up Continuous** Displays facing pages side by side in a continuous vertical column.

***Note:*** *If a document has more than two pages, the Two-Up and Two-Up Continuous views display the first page alone on the right side of the document pane, to ensure proper display of two-page spreads.*



*Single Page, Single Page Continuous, Two-Up, Two-Up Continuous page layouts*

### Set page layout

- To see only one page at a time, choose View > Page Display > Single Page.
- To see two pages at a time, side by side, choose View > Page Display > Two-Up.
- To scroll down continuously through one page after another, choose View > Page Display > Single Page Continuous.
- To scroll down continuously through two pages at a time, choose View > Page Display > Two-Up Continuous.

You can also display buttons for each of these options in the Display Pages toolbar by choosing Tools > Toolbars > More Tools, and selecting them in the More Tools dialog box.

***Note:*** *In Single Page layout, choosing Edit > Select All selects all text on the current page. In other layouts, Select All selects all text in the PDF.*

### Rotate the page view

You can change the view of a page in 90˚ increments. This changes the view of the page, not its actual orientation. You can't save this change.

❖ Choose View > Rotate View > Clockwise or Counterclockwise, or click the Rotate Clockwise button or the Rotate Counterclockwise button in the toolbar.

***Note:*** *If you want the rotation to be saved with the document, choose Document > Rotate Pages.*

### Change the default page layout

1. Choose Edit > Preferences.
2. Under Categories, select Page Display.
3. Open the Page Layout menu and choose Automatic, Continuous, Single Page, Two-Up, or Two-Up Continuous.

## Use split-window view

You can view a PDF with the document pane divided into two panes (Split command) or four panes (Spreadsheet Split command).

With Split view, you can scroll, change the magnification level, or turn to a different page in the active pane without affecting the other pane.

The Spreadsheet Split view is useful if you want to keep column headings and row labels visible while scrolling through a large spreadsheet or table. In this mode, changing the magnification in one pane changes the magnification in all panes. Also, scrolling is coordinated between the panes: scrolling a pane horizontally also scrolls the pane above or below it; scrolling vertically also scrolls the pane to the left or right of that pane.

**1** Start creating the type of split view you want:

- To split the view into two panes, choose Window > Split, or drag the gray box above the vertical scroll bar.
- To split the view into four panes with synchronized scrolling and zoom levels, choose Window > Spreadsheet Split.

**2** Drag the splitter bars up, down, left, or right to resize the panes, as needed.

**3** Adjust the zoom level, as needed:

- In Split view, click a pane to make it active, and change the zoom level for that pane only.
- In Spreadsheet Split view, adjust the zoom level to change the displays in all four panes.

**4** Scroll, as needed:

- In Split view, click a pane to make it active, and scroll to change that pane only.
- In Spreadsheet Split view, click a pane, and scroll vertically to change the views in the active pane and the pane beside it. Scroll horizontally to change the views in the active pane and the pane above or below it.

**5** To restore single-pane view, choose Window > Remove Split.

## View a document in multiple windows

You can create multiple windows for the same document using the New Window command. New windows have the same size, magnification, and layout as the original window and open at the same page and on top of the original window. When you open a new window, Acrobat adds the suffix 1 to the original filename and assigns the suffix 2 to the new window. You can open multiple windows with the suffix incrementing with each new window. Closing a window causes the remaining open windows to be renumbered sequentially; that is, if you have five windows open and you close the third window that you opened, the windows are renumbered with the suffixes 1 to 4.

***Note:*** *This feature is not available when PDFs are viewed in a browser.*

#### Open a new window

❖ Select Window > New Window.

#### Close a window

❖ Click the close box in the window. You are prompted to save any changes. Closing a window does not close a document if more than one window is open.

#### Close all windows for a document

❖ Choose File > Close. You are prompted to save any changes before each window is closed.

### Display off-screen areas of a magnified page

When you zoom in to a high magnification, you may be able to see only part of a page. You can shift the view to show other areas of the page without changing the magnification level.

❖ Do either of the following:

- Use the vertical scroll bars to move up and down the pages or the horizontal scroll bars to move across the page.
- Select the Hand tool in the Select & Zoom toolbar, or choose Tools > Select & Zoom > Hand Tool, and drag to move the page, as if moving a piece of paper on a table.

#### See also

"About PDF layers" on page 277

### Display PDFs in Line Weights view

The Line Weights view applies a constant stroke width (1 pixel) to lines, regardless of zoom. When you print the document, the stroke will print at the true width. Line Weights view is off by default.

❖ Choose View > Line Weights. To turn off Line Weights view, choose View > Line Weights again.

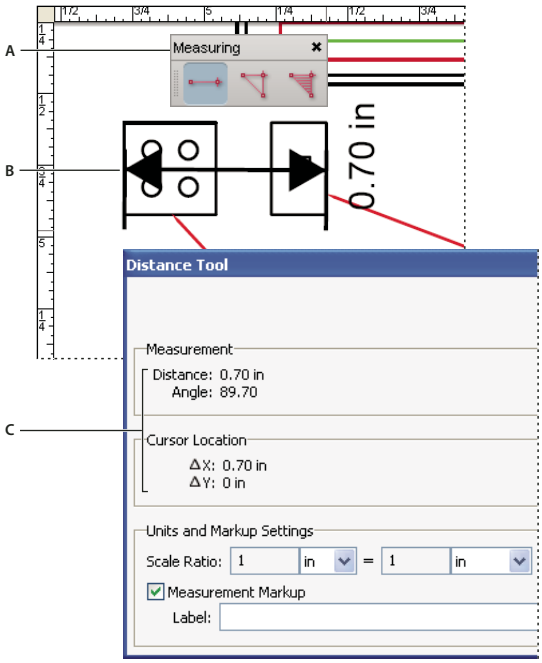
***Note:*** *Line Weights view is not available for viewing PDFs within a web browser.*

# Grids, guides, and measurements

### Measure the height, width, or area of objects

The Measuring toolbar contains tools you can use to measure distances and areas of objects in PDF documents. The measuring tools are especially useful when you need to know the distances or areas associated with objects in a form or computer-aided design (CAD) drawing, or when you want to measure certain areas of a document before sending it to a professional printer. The measuring tools are available to Reader users only if the PDF creator enables measuring functionality.

When you use a measuring tool, the tool dialog box displays the measurements of the line segments you draw.




*Measuring tools*
***A.** Measuring toolbar **B.** Object being measured **C.** Tool display*

**1** Choose Tools > Measuring, and select a measuring tool. Or, right-click/Control-click the toolbar area, and then choose Measuring.

**2** To measure areas of your PDF document, do any of the following:

- Select the Distance tool to measure the distance between two points. Click the first point, move the pointer to the second point, and then click again. The measurements appear in the tool dialog box.
- Select the Perimeter tool to measure a set of distances between multiple points. Click each point you want to measure. Then, double-click the last point, or hold the pointer over the last point and click.
- Select the Area tool to measure the area within the line segments that you draw. Click each point you want to measure. After you have clicked at least two points, click the first point to complete the area measurement.

***Note:** You can also finish a measurement by right-clicking/Control-clicking and choosing Complete Measurement from the context menu.*

**3** While measuring objects, do any of the following:

- To change the scaling ratio (such as 3:2) on the drawing areas, specify the appropriate numbers in the tool dialog box. If desired, change the unit of measurement next to this ratio.
- Select Measurement Markup in the tool dialog box if you want the lines you draw to appear as a comment. You can then use the Hand tool to double-click the comment and view the measurement for the line segments that you draw. Unless Annotate is selected, the object you draw will disappear when you measure another object or select another tool.

### View the Info panel

The Info panel lets you see the coordinate position of the pointer within the document pane. The position numbering begins at the upper left corner of the document. The Info panel also shows the width and height of a selected object as you resize it.

#### View x and y coordinates

1 Choose View > Navigation Panels > Info.

2 Move the mouse pointer to view x and y coordinates.

#### Change the panel's measurement units

❖ In the Options menu in the Info panel, choose a different unit of measurement. The currently selected option has a check mark next to its name.

# Saving PDFs

### About saving PDFs

You can save a copy of a PDF with any comments, entries in form fields, or digital signatures that you have added to the PDF. If the PDF restricts your usage rights, the document message bar under the toolbar area describes these restrictions when you open the document.

You can also save the contents of a PDF in text format. This allows you to easily reuse the text from a PDF and to use the content with a screen reader, screen magnifier, or other assistive technology.

### Save a copy of a PDF

1 Choose File > Save As (or Save A Copy, if Save As is not shown).

2 In the Save As dialog box, enter the filename and location, and click Save.

### Save comments, form field entries, and digital signatures

❖ Do one of the following:

- Choose File > Save to save changes to the current file.
- Choose File > Save As to save changes to a new file.

*If you are viewing a PDF in a web browser, the Acrobat File menu is not available. However, you can use the Save A Copy button in the Acrobat toolbar to save the PDF.*

#### See also

"Filling in PDF forms" on page 186

"Participating in a PDF review" on page 151

## Save document changes

If you modify a PDF—such as by adding new pages from another file or deleting pages—you can save your changes by saving the PDF or by saving a copy of the PDF. You can also save changes to your work incrementally and then recover those changes if a problem occurs.

***Note:*** *Saving a digitally signed PDF invalidates the signature.*

#### Save changes

- To save the changes to the current document, choose File > Save.
- To save the modified document to a new file, choose File > Save As. For Save As Type (Windows) or Format (Mac OS), choose Adobe PDF Files (*.pdf). Type a name and location, and click Save.

#### Recover the last saved version

❖ Choose File > Revert, and then click Revert.

## About the Autosave feature

The Autosave feature guards against losing your work in case of a power failure by incrementally, and at regular intervals, saving file changes to a specified location. The original file is not modified. Instead, Acrobat creates an autosave file of changes, which includes all the changes you made to the open file since the last automatic save. The amount of new information that the autosave file contains depends on how frequently Acrobat saves the autosave file. If you set the autosave interval to 15 minutes, you could lose the last 14 minutes of your work if a problem occurs. Frequent automatic saving prevents loss of data, and is especially useful if you make extensive changes to a document, such as by adding comments.

You can apply autosave changes to the original files when you restart Acrobat. When you close, save manually, or revert to the last-saved version of a file, the autosave file is deleted.

***Note:*** *If you use assistive technology, such as a screen reader, you may want to disable the Autosave feature so that you don't lose your place when the file is reloaded.*

The Autosave feature won't work in the following cases:

- A document that has its security changed. You must save the document to re-enable automatic saving of document changes.
- A document created using the WebCapture feature or extracted from a larger PDF (Document > Extract Pages). You must save the document to enable automatic saving of changes.
- A document displayed in a web browser or incorporated into a container document that supports Object Linking and Embedding (OLE). This document appears outside the default file system and cannot support automatic saving.

## Recover lost changes

To prevent lost changes after an unexpected interruption, the Autosave feature must be enabled, which is the default setting.

#### Set up automatic saving

1. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).
2. Select Documents in the Categories list.

**3** If Automatically Save Document Changes To Temporary File Every *xx* Minutes (1-99) is not selected, select it now.

**4** In the Minutes box, specify how often you want Acrobat to save files.

#### Recover lost changes after an unexpected shutdown

**1** Start Acrobat or open the file you were working on last.

**2** When prompted, click Yes to open the autosave file or files. If multiple files were open, Acrobat opens all of the files for you.

**3** Save the file or files with the same names as the files you were originally working on.

### Reduce file size by saving

You can sometimes reduce the file size of a PDF simply by using the Save As command. Reducing the size of PDFs improves their performance—particularly when they're being accessed on the web—without altering their appearance.

The Reduce File Size command resamples and recompresses images, removes embedded fonts, compresses document structure, and cleans up elements such as invalid bookmarks. If the file size is already as small as possible, this command has no effect.

***Note:*** *Reducing the file size of a digitally signed document removes the signature.*

**1** Choose Document > Reduce File Size.

**2** Select the version compatibility that you need, and click OK.

If you're certain that all your users use Acrobat 8 or Adobe Reader 8, limiting compatibility to the latest version can further reduce file size.

***Note:*** *If you select Acrobat 4.0 And Later, and the document contains transparency, the conversion will fail.*

#### See also

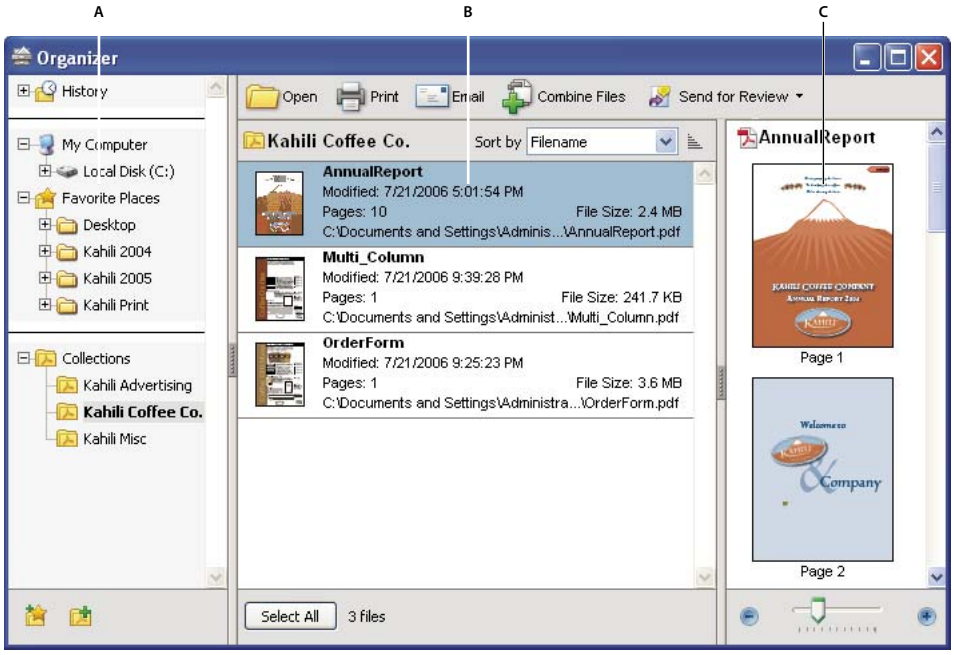
"Balancing PDF file size and quality" on page 58

# Organizer

### Organizer window overview

Organizer helps you find PDFs that you've previously opened and PDFs that you've organized into collections and favorites. With Organizer, you can see thumbnail images of PDF pages to quickly identify files. You can also use Organizer to organize related PDFs without changing their location in your file structure, and quickly browse, find, and sort PDFs that you recently viewed.

You access the Organizer and Organizer-related commands in the File menu. After you select one or more files within the Organizer, you can start one of several different tasks using the buttons above the file list.




*Organizer window in Windows*
***A.** Categories pane **B.** Files pane **C.** Pages pane*

### Categories pane

The categories pane of the Organizer window is divided vertically into sections that contain categories. These items can help you locate and organize PDFs that reside on your computer, on a network, and on the web.

**History** Contains subcategories that list all the PDFs that you've opened during a specified period of time. You can't change the subcategory names or manually add PDFs to the History, which is automatically updated each time you open a PDF and as time passes, but you can clear the entire history by using the Clear History button in the files pane. You can also control the maximum length of the file history or turn it off with the Remember Files In Organizer History For option in Edit > Preferences > Documents.

**My Computer (Windows) or *[disk name]* (Mac OS)** Lists the hard drives and folders in their current hierarchy. This category is especially useful if you know where a particular PDF resides.

**Favorite Places** Lists any folders, network locations, and web directories that you've specified as favorite destinations. This category functions like bookmarks or favorite destinations that you create for quick access in a web browser, except that the destinations are folders or disk drives that contain PDFs. You can add or remove destinations from the Favorite Places list, but you can't edit the destination names.

**Collections** Contains collection folders that list all PDFs that you've associated with each particular collection folder. Each collection folder can point to multiple PDFs no matter where each PDF is located; for example, a single collection folder can list PDFs that are actually located in different folders on your computer, on a network, and also on the web. You can change each collection folder's name, add new collection folders, and add PDFs to each collection folder.

***Note:** Collections and PDF packages both involve multiple PDFs, but in very different ways. A PDF package is itself a PDF file that can be composed of multiple PDFs and that exists in a folder on your computer. For example, you can attach a PDF package to an email message. Collections are more like reminders that help you find related files that may be stored in different locations on your computer.*

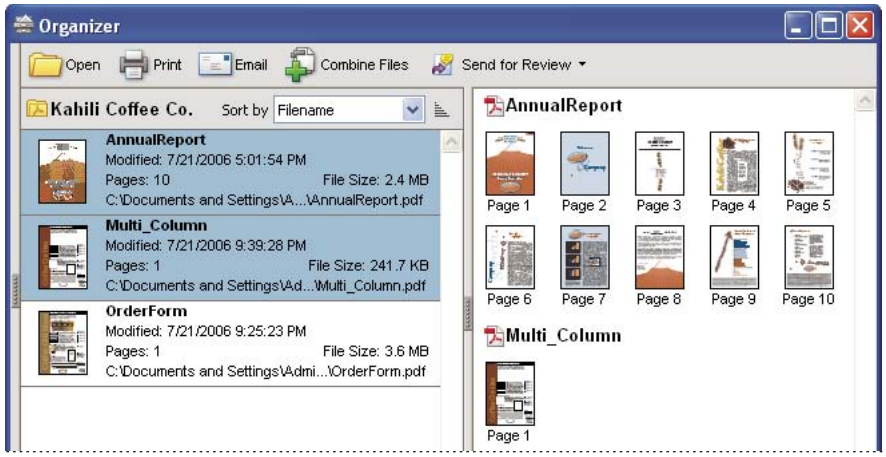
### Files pane

The files pane in the Organizer window lists the PDFs that are within the subcategory or folder selected in the categories pane; each PDF listing shows the filename, modification date, page number, file size, location, and a thumbnail image of the first page. You can sort the list by filename, metadata information, number of pages, file size, modification date, and date last opened.

Use the buttons at the top of the Organizer window to open, print, email, or combine one or more selected PDFs; in addition, you can send a selected PDF for review or approval, or upload it for a browser-based review.

### Pages pane

The pages pane of the Organizer window displays thumbnails for every page of all PDF files that are selected in the files pane. The Zoom slider and buttons at the bottom of the pages pane let you adjust the size of the page thumbnails.




*Selecting a PDF (left) reveals a thumbnail for each page in the pages pane (right).*

## Adjust the Organizer window

You can make changes to your view of the Organizer.

### See also

"Combining files into PDFs" on page 112

"Starting and managing a review" on page 146

#### Display the Organizer window

❖ Choose File > Organizer > Open Organizer.

*It isn't necessary to open the Organizer window if you want to open a PDF in a collection, create a new collection, add an open PDF to a collection, or open a PDF from your history of opened PDFs. Choose File > Organizer or File > History to access commands that let you do all of these things.*

#### Resize the Organizer and its panes

- To resize a pane relative to the other panes, drag the vertical bar that separates two panes.
- To resize the Organizer window, drag the left, right, or bottom edge of the window.

### Sort the files pane list

1 If necessary, select a subcategory or folder in the categories pane to display PDFs in the files pane.

2 In the files pane, do any of the following:

- To sort the list of PDF files according to a particular property, choose a property from the Sort By menu.
- To change the sorting direction, click the Ascending Sort Order button or the Descending Sort Order button to the right of the Sort By menu.
- To view the location of the selected PDFs, right-click/Control-click, and choose Show In Windows Explorer (Windows) or Show In Finder (Mac OS).

## Organize PDF collections

You can manage PDF collections in the Organizer window.

### Add a PDF to a collection

❖ Do any of the following:

- Right-click/Control-click the collection, choose Add Files, select one or more PDFs, and click Add.
- Right-click/Control-click the PDF in the files pane, and choose Add To A Collection > *[collection name]*.
- Drag a PDF from Windows Explorer or Mac OS Finder to the collection in the categories pane.
- After selecting a subcategory in the History, My Computer, or Favorite Places category, drag a PDF from the files pane to the desired collection.
- In Acrobat, open the PDF and choose File > Organizer > Add To A Collection. Then either select the collection to which you want to add the PDF or click New Collection, type a name, and click Create.

*You can open any PDF from a collection by using the Open button in the Organizer window or by choosing the PDF filename from a submenu directly in Acrobat. To open a PDF from a collection in Acrobat, choose Collections > [collection name] > [PDF filename] from either the File > Organizer submenu or the Organizer menu in the File toolbar.*

### Edit the collection folders

- To rename a collection, right-click/Control-click the collection name, choose Rename Collection, and then type the new name.
- To delete a collection, right-click/Control-click the collection name, choose Delete Collection, and then click Yes in the confirmation dialog box. The PDF files within the collection aren't deleted from their original locations.
- To create a new collection, click the Create A New Collection button in the Organizer window. Or, in Acrobat, choose File > Organizer > Create A New Collection. Type a name for the collection.

### Move a PDF to a different collection

❖ To move a PDF from one collection to another, select the collection that contains the PDF, right-click/Control-click the PDF file in the files pane, and choose Move To Collection > *[collection name]*.

### Remove a PDF from a collection

❖ To remove a PDF from a collection, select the collection, right-click/Control-click the PDF in the files pane, and choose Remove From *[collection name]*.

## Organize PDFs with the Favorite Places category

**1** To add an existing folder or hard drive to the category, do one of the following:

- Click the Add A Favorite Place button, select a folder or hard drive, and click OK.
- Right-click/Control-click the folder in the My Computer (Windows) or *[disk name]* (Mac OS) category, and choose Add *[folder name]* To Favorite Places.
- Right-click/Control-click the subfolder in the Favorite Places category, and choose Add *[favorite place name]* To Favorite Places.

**2** To remove a folder or hard drive from the list of Favorite Places, right-click/Control-click the item, and choose Remove *[folder name]* From Favorite Places.

## Expand views in the Categories pane

Items in the Categories pane can be expanded and collapsed by clicking the plus sign [+] (Windows) or arrow (Mac OS) so that you can see more of the structure. When you select a date category, folder, or collection, all PDFs in that item are listed in the pages pane.

### Expand an Organizer category

**1** To expand or collapse a category or folder in the categories pane, click the icon to the left of the category icon or folder icon.

**2** Select a subcategory or folder under a main category. The pages pane lists all PDFs associated with that subcategory or folder.

### Expand the file structure

❖ Select a folder in the My Computer (Windows) or *[disk name]* (Mac OS) category. All PDFs in that folder are listed in the files pane.

## Start a task from the Organizer files pane

**1** Select a subcategory or folder under a main category in the categories pane to display PDFs in the files pane.

**2** Select the file or files you want to work with:

- To select a listed PDF file, click it.
- To select all the PDF files listed, click Select All.
- To add noncontiguous PDF files to or remove them from the selection, Ctrl-click/Command-click them.
- To add contiguous PDF files to the selection, Shift-click them.

**3** To perform an action on the selected PDF files, click one of the task buttons at the top of the Organizer window:

- To open, print, or email the PDF files, use the buttons above the files pane.
- To start combining PDF files into a single PDF file, click the Combine Files button and follow the instructions in the wizard.
- To start a review, select the PDF and choose Send For Review > Send For Shared Review or Send For Review > Attach For Email Review.

### See also

"Combining files into PDFs" on page 112

"Starting and managing a review" on page 146

### Erase the history of opened PDFs

**1** Select a History subcategory in the categories pane.

**2** Click Clear History in the files pane.

# Maintaining the software

## About the updating process

Acrobat application files and components can be updated in a variety of ways. Some updates are available when you open a PDF that triggers the updating process automatically. For example, if you open a form that uses Asian-language fonts, Acrobat asks whether you want to download the fonts. Other updates are available only from the Help menu, and you must install them manually. Some updates are available both automatically and manually.

Depending on your preferences settings, Acrobat downloads updates in the background.

## Update the software

❖ Choose Help > Check For Updates, and follow any on-screen instructions.

## Change updating preferences

**1** Choose Help > Check For Updates.

**2** In the Adobe Updater dialog box, click Preferences.

**3** Select Automatically Check For Adobe Updates, and specify whether you want automatic checking on a weekly or monthly basis and whether or not you want to be asked before updates are downloaded.

**4** Make sure that the application you are running (Adobe Reader or Adobe Acrobat) is selected as the software that will be updated.

**5** If appropriate, click Browse to navigate to the location in which you want the downloads to be placed.

## About Speed Launcher (Windows)

When you install Acrobat, the Speed Launcher program is installed into your computer's Common Startup group. The Speed Launcher shortens the time needed to start Acrobat.

Although this is not recommended, you can disable Speed Launcher by dragging its icon out of the Startup folder.

***Note:*** *If you have both Acrobat and Reader installed on the same system, two Speed Launcher icons appear in the Startup folder. If you want to disable Speed Launcher, remove both Speed Launcher icons from the Startup folder.*

For more information about this topic, see the Adobe support website.

## Manage plug-ins

Plug-ins add more functionality, but they also increase the memory needed. To minimize memory requirements, you may want to install only the plug-ins that you use. To load a plug-in correctly, you must place it in the plug-ins folder. You can temporarily disable plug-ins when starting your software.

### Disable a plug-in

**1** Do one of the following:

- (Windows) Open the plug_ins folder (Program Files/Adobe/ Acrobat 8.0/ Acrobat/plug_ins).
- (Mac OS) Control-click the application icon, and choose Show Package Contents. Then double-click the Contents folder and open the Plug-ins folder.

**2** Select the plug-ins you do not want to load, and move them out of the folder. Some of the plug-ins may be in folders nested inside the plug-ins folder.

### Disable all plug-ins temporarily

❖ Press the Shift key immediately after starting Acrobat.

## Adobe Digital Editions

Acrobat 8 changes the way you open and manage eBooks. Now, you use the free Adobe® Digital Editions software to read and organize eBooks and other publications. Digital Editions is a separate web-based Rich Internet Application (RIA) that replaces the eBooks features in previous versions of Acrobat.

When you install Digital Editions, your existing bookshelf items are automatically imported and available within the new Digital Editions bookshelf experience. You can also manually import individual PDFs into your Digital Editions bookshelf.

***Note:*** *When you double-click the icon for an eBook, Acrobat automatically opens the Digital Editions download website, where you can start installing the software.*

To learn more about how to make the transition to this new solution for eBooks and for a link to the secure download website, go to the Adobe website.

# Non-English languages

## Asian language PDFs

You can use Acrobat to view, search, and print PDF documents that contain Asian text (Traditional and Simplified Chinese, Japanese, and Korean). You can also use these languages when you fill in forms, add comments, and apply digital signatures.

Almost all of the Acrobat features are supported for Traditional and Simplified Chinese, Japanese, and Korean text.

In Windows, you must install the Asian language support files by using the custom installation and selecting the Asian Language Support options under Create Adobe PDF and View Adobe PDF.

PDFMaker and the Adobe PDF printer automatically embed most Asian fonts in your file when creating PDF files. You can control whether Asian fonts are embedded.

In Windows, you may be able to view and print files that contain Asian languages without having the necessary Asian language support installed on your system. If you try to open a PDF file for which language support is required, you are automatically prompted to install the required fonts.

## Cyrillic, Central European, and Eastern European language PDFs

You can work with Adobe PDF files that contain Cyrillic text (including Bulgarian and Russian), Central European text, and Eastern European text (including Czech, Hungarian, and Polish) if the fonts are embedded in the PDF files. If the fonts are embedded, you can view and print the files on any system. Fonts do not need to be embedded to use the Search feature.

***Note:*** *If you open a PDF file in which form fields or text boxes contain these languages but the fonts are not embedded and are not installed on your system, choosing Help > Check For Updates Now automatically prompts you to download and install the necessary fonts.*

## Hebrew, Arabic, Thai, and Vietnamese language PDFs

Acrobat supports the entry and display of Thai and Vietnamese text. In Windows only, Acrobat also supports Arabic and Hebrew. By default, Right-To-Left Language Options is enabled under Arabic and Hebrew regional settings (in Windows).

## Enable right-to-left languages

Enabling right-to-left language options displays the user interface elements for controlling paragraph direction, digit style, and ligature. When this option is selected, you can specify the writing direction (left-to-right or right-to-left) and type of digits (Western or Arabic-Indic) used for creating and filling out certain form fields, adding digital signatures, and creating text box markups.

Enable Right-To-Left Language Options is enabled by default under Arabic and Hebrew regional settings.

1. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).
2. Under Categories, select International.
3. Select Enable Right-To-Left Language Options.

# Chapter 3: Creating PDFs

Adobe PDF is the solution of choice for capturing robust information from any application on any computer system. You can create PDFs from blank pages, document files, scanned paper documents, and clipboard images.

## Quickstart

Following are quick steps for some common PDF creation tasks.

### Create from a file

To create a PDF from within Acrobat, the application that created the original file must be installed on the system in most cases.

1 Click the Create PDF button and choose From File.

2 Select the file you want to convert, and click Open.

The authoring application opens automatically or a progress dialog box appears. If the file is in an unsupported format, a message appears, telling you that the file cannot be converted to a PDF.

#### See also

"Convert a file to PDF" on page 58

### Create from a paper document

You can create a PDF directly from a paper document using Acrobat and your scanner.

1 Click the Create PDF button and choose From Scanner.

2 Select the input, output, and document options in the Acrobat Scan dialog box, and then click Scan.

3 If creating a new PDF, specify a filename and location, and click Save.

4 Select Scan More Pages or Scanning Complete.

#### See also

"Scan a paper document to PDF" on page 61

### Create from a web page

You can download and convert web pages from the top level, or any number of subordinate levels, of a URL.

1 Click the Create PDF button and choose From Web Page.

2 Type the URL into the text box. (Click Browse to convert a web page you have already downloaded.)

3 Specify the number of levels to download and where to download files from, and then click Create.

### See also

"Convert web pages to PDF in Acrobat" on page 85

## Create from scratch

You can create small PDFs that can be edited in Acrobat.

1 Choose File > Create PDF > From Blank Page.

2 Click in the document and begin typing. Use options on the New Document toolbar to change text attributes.

3 Save the document.

4 To continue editing, choose Document > Resume Editing.

To convert the PDF so that it cannot be re-edited, choose Document > Prevent Further Edits.

### See also

"Create a PDF from a blank page" on page 60

## Create from Word

After you install Acrobat, an Acrobat PDFMaker toolbar is added to Microsoft® Word. In Word 2007 for Windows, you access the PDFMaker options from the Acrobat ribbon instead of the toolbar.

1 In Word, open the file you want to convert.

2 Do one of the following:

- (Word 2007 for Windows) Click Acrobat and then click the Create PDF button .
- (Other versions of Word) Click the Convert To Adobe PDF button .

3 Specify a filename and location, and click Save.

4 (Mac OS only) Click View File or Done.

You can also convert a file to PDF and then email it for review by clicking Create And Send For Review (Office 2007) or Send For Review (other versions of Office).

### See also

"Creating PDFs with PDFMaker" on page 70

## Create from Outlook (Windows)

After you install Acrobat, an Acrobat PDFMaker toolbar is added to Outlook.

1 Select the desired email messages and click Create Adobe PDF From Selected Messages .

2 Specify a filename and location, and click Save.

The selected messages are converted to a PDF package or a merged PDF, depending upon conversion settings. To convert email folders, select the desired folders and click Create Adobe PDF From Folders . You can also automatically archive email messages and folders.

### See also

"Convert email messages to PDFs (Windows)" on page 74

## Automatically archive email (Windows)

You can automatically archive your Outlook email messages as PDFs.

1 In Outlook, choose Adobe PDF > Setup Automatic Archival.

2 Click the Automatic Archival tab, and select Enable Automatic Archival.

3 Specify frequency and run time. If desired, set up a log file and embedded index.

4 Click Add, select the desired folders, and specify a filename and location for the archive.

To create an archive immediately, click Run Archival Now.

### See also

"Set up automatic email archiving (Windows)" on page 77

## Create from Lotus Notes (Windows)

After you install Acrobat, an Acrobat PDFMaker toolbar is added to IBM Lotus Notes and commands are added to the Actions menu.

1 Select the desired email messages and click Convert Selected Messages To Adobe PDF .

2 Specify a filename and location, and click Save.

The messages are converted to a merged PDF or a PDF package, depending upon conversion settings. You can convert an entire folder to PDF by clicking Convert Selected Folder To Adobe PDF .

### See also

"Convert email messages to PDFs (Windows)" on page 74

## Create from Internet Explorer (Windows)

You can convert an entire web page or a selected portion of it to PDF.

1 In Microsoft Internet Explorer, open the web page you want to convert.

2 (Optional) Drag to select the text and images you want to convert.

3 Click Convert Web Page To PDF .

4 Specify a filename and location, and click Save.

You can also convert one or more web pages, and even entire websites, from within Acrobat.

### See also

"Convert web pages to PDF in Internet Explorer (Windows)" on page 82

## Create using Adobe PDF printer

In many applications, you can use the Print command with the Adobe PDF printer to convert a file to PDF.

1 Open the file you want to convert, and choose File > Print.

2 Choose Adobe PDF from the list of printers, and print the file.

3 If prompted, specify a filename and location, and click Save.

You can also choose a different default Adobe PDF printer setting or create a customized setting.

### See also

"Create PDFs by printing to file" on page 67

# Overview of creating PDFs

## What's the best way to create a PDF?

There are many correct answers to this question. You create a PDF by converting other documents and resources to Portable Document Format.

Adobe Acrobat is a powerful tool with many uses, but it is not an *authoring application*—that is, not an application in which you design page layouts, write text, or create and place images on a blank page. Instead, it works in harmony with other applications and built-in operating system features to produce PDFs that you can then use for a variety of purposes.

The best method for creating a PDF depends on several things:

- What is the source document?

You can create PDFs from documents printed on paper, Word documents, InDesign files, images taken by a digital camera, and spreadsheets, to name just a few examples. Different types of sources have different tools available for PDF conversion.

- What is already running on your computer?

You can save time by using the most readily available Acrobat conversion feature. If the document you want to convert is already open in its authoring application (for example, a spreadsheet that is open in Excel), there are several ways to convert the file to PDF without opening Acrobat. Similarly, if Acrobat is already open, you don't have to open the authoring application to convert a file to PDF.

- How will you use the PDF?

Every PDF strikes a balance between efficiency (small file size) and quality (such as resolution and color). When that balance is critical to your task, you'll want to use a method that includes access to various conversion options as a part of the process.

For example, you can drag and drop files on the Acrobat icon on the desktop to create PDFs, but Acrobat simply applies the most recently used conversion settings without offering you access to those settings. If you want more control over the process, another method might be a better choice.

***Note:*** *In Acrobat 8, you can also create a new PDF from a blank page.*

### See also

"Create a PDF from a blank page" on page 60

## PDF creation methods by file type

Refer to the following lists to determine the methods available for the different types of files.

### Most files

These methods can be used for documents and images in almost all file formats.

**Create PDF menu** Within Acrobat, by choosing From File.

**Adobe PDF printer** Within most applications, in the Print dialog box.

**Drag and drop** On the desktop, in Windows Explorer or in Mac OS Finder.

**Context menu** On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

### Paper documents

Requires a scanner and a hard copy of the document.

**Create PDF menu** Within Acrobat, by choosing From Scanner. Or, for previously scanned paper documents, by choosing From File.

**Document menu** Within Acrobat, by choosing Scan To PDF.

### Microsoft Office documents

**PDFMaker** Within the authoring application, in the PDF toolbar and on the Adobe PDF menu. For Office 2007 applications, in the Acrobat Ribbon and on the Microsoft Office Button menu.

**Adobe PDF printer** Within the authoring application, in the Print dialog box.

**Drag and drop** On the desktop, in Windows Explorer or in Mac OS Finder.

**Context menu** On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

### Email messages

**PDFMaker (Windows only)** Within Microsoft Outlook or Lotus Notes, by clicking Acrobat PDFMaker toolbar buttons or choosing commands in the Adobe PDF menu (Outlook) or the Actions menu (Lotus Notes).

**Adobe PDF printer** Within the email application, in the Print dialog box. Creates a PDF (not a PDF package).

### Web pages

**Create PDF menu** Within Acrobat, by choosing From Web Page.

**PDFMaker** Within Internet Explorer or when editing in a web-authoring application that supports PDFMaker, such as Word; in the Acrobat PDFMaker toolbar and on the Adobe PDF menu.

**Adobe PDF printer** Within Internet Explorer or when editing in a web-authoring application that supports PDFMaker, such as Word; in the Print dialog box.

**Drag and drop** On the desktop, in Windows Explorer or in Mac OS Finder, dragging the HTML file.

**Context menu (HTML files)** On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking the HTML file).

### Images copied on the clipboard

**Create PDF menu** Within Acrobat, by choosing From Clipboard Image.

### Adobe Creative Suite files

**Adobe PDF printer** Within the authoring application, in the Print dialog box.

**Export** Within InDesign or Adobe GoLive®, on the File menu. (In InDesign, using the file type menu in the Export dialog box; in GoLive, using the HTML As Adobe PDF command on the Export submenu.)

**Save As** Within Adobe Photoshop® or Adobe Illustrator, on the File menu and using the file type menu in the Save As dialog box.

**Drag and drop** On the desktop, in Windows Explorer or in Mac OS Finder.

**Context menu** On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

**PostScript and EPS files**

**Drag and drop** On the desktop, in Windows Explorer or in Mac OS Finder, by dragging to the Acrobat Distiller icon or into the Acrobat Distiller window.

**Double-clicking** (PostScript files only) On the desktop, in Windows Explorer or Mac OS Finder.

**Open command** Within Acrobat Distiller, on the File menu.

**Create PDF menu** Within Acrobat, by choosing From File.

**Adobe PDF printer** Within the authoring application, in the Print dialog box.

**Context menu** On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

### Balancing PDF file size and quality

There are important settings that you can select so that your PDF has the best balance between file size, resolution, conformity to specific standards, and other factors. Which settings you select depends on your goals for the PDF that you are creating. For example, a PDF intended for high-quality commercial printing requires different settings than a PDF intended only for on-screen viewing and quick downloading over the Internet.

Once selected, these settings apply across PDFMaker, Acrobat, and Acrobat Distiller. However, there are some settings that are limited to specific contexts or file types. For example, PDFMaker options can vary among the different types of Microsoft Office applications.

For convenience, you can select one of the conversion presets available in Acrobat. You can also create, define, save, and reuse custom presets that are uniquely suited to your purposes.

### See also

"Adobe PDF conversion settings" on page 92

# Creating simple PDFs with Acrobat

### Convert a file to PDF

**1** In Acrobat, do one of the following:

- Choose File > Create PDF > From File.
- On the toolbar, click the Create PDF button and choose From File.

**2** In the Open dialog box, select the file you want to convert to PDF. You can browse all file types or select a specific type in the Files Of Type menu.

**3** (Optional) Click Settings to change the conversion options. The options available vary depending on the file type.

***Note:*** *The Settings button is unavailable if you choose All Files as the file type or if no conversion settings are available for the selected file type.*

**4** Click Open to convert the file to a PDF.

Depending on the type of file being converted, the authoring application opens automatically or a progress dialog box appears. If the file is in an unsupported format, a message appears, telling you that the file cannot be converted to PDF.

**5** When the new PDF opens, choose File > Save or File > Save As; then select a name and location for the PDF.

*When naming a PDF that's intended for electronic distribution, limit the filename to eight characters (with no spaces) and include the .pdf extension. This ensures that email programs or network servers don't truncate the filename and that the PDF opens as expected.*

### See also

"View PDFMaker conversion settings" on page 73

"Combining PDF content" on page 109

## Drag and drop to create PDFs

This method is usually best reserved for small, simple files, such as small image files or plain text files, when the balance between file size and output quality is not important. You can use this technique with many other types of files, but you won't have the opportunity to adjust any conversion settings during the process.

**1** Using Explorer (Windows) or the Finder (Mac OS), select the file icons of one or more files that you want to convert to PDF.

**2** Drag the file icons onto the Acrobat application icon. Or, (Windows only) drag the files into the open Acrobat window.

If a message appears saying that the file could not be opened in Acrobat, then that file type cannot be converted to PDF by the drag-and-drop method. Use one of the other conversion methods for that file.

***Note:*** *You can also convert PostScript and EPS files to PDF by dragging them onto the Acrobat Distiller window or the Distiller application icon.*

**3** Save the PDF.

*(Windows only) You can also right-click a file in Windows Explorer and choose Create PDF.*

## Convert clipboard images to PDF

You can create PDFs from screen captures and other images you copy from an image-editing application.

❖ Use the method described for the operating system running on your computer:

- (Windows) Capture a displayed image to the Clipboard, either by using the Copy command in an image-editing application, such as Adobe Photoshop, or by pressing the PrintScreen key. Then in Acrobat, choose File > Create PDF > From Clipboard Image, or choose From Clipboard Image in the Create PDF toolbar menu.
- (Mac OS) Choose Acrobat > Services > Grab > [Screen, Selection, or Timed Screen]. (Grab is the Mac OS X screen-capture utility.) Your screen capture automatically converts to a PDF and opens.

***Note:*** *The From Clipboard Image command appears only when there is an image copied to the clipboard. If the clipboard is empty or if you have copied text to the clipboard, the command does not appear.*

## Create a PDF from a blank page

Adobe® Acrobat® 8 Standard introduces the PDF Editor feature. With it, you can create a PDF from a blank page rather than beginning with a file, a clipboard image, or scanning.

This process can be useful for creating relatively small PDFs of up to about a dozen pages. For longer, more complex, or heavily formatted new documents, it's usually better to create the source document in an authoring application that offers more layout and formatting options, such as Adobe InDesign or various business software products.

***Note:*** *The PDF Editor can make changes in text only with PDFs created from blank pages. To add a blank page to a PDF created by another method, create a blank document in another application and convert that file to PDF and import it into the existing PDF.*

### Create and add text to a new, blank PDF

**1** Choose File > Create PDF > From Blank Page.

**2** Begin typing the text you want to add to the blank page.

**3** Add any formatting to the text by selecting it and selecting options on the New Document toolbar.

**4** As needed, select other tools and options that you want to apply to the PDF.

**5** Choose File > Save, and select a name and location for the PDF file.

***Note:*** *When the page is filled with text, the PDF Editor automatically adds a new blank page to the document.*

### Edit text in a PDF created from a blank page

**1** Choose File > Open, and locate and select a PDF created with PDF Editor (that is, one created from a blank page).

**2** Choose Document > Resume Editing.

**3** Add text and formatting as needed.

### Prevent changes in PDF Editor

You can freeze the text you have added to PDFs created from a blank page. This prevents anyone from adding or changing the text. There is no Undo for this process.

**1** Choose Document > Prevent Further Edits.

**2** In the message that appears, click Prevent Further Edits to confirm your choice. Or, click Keep Text Editable if you want to continue adding or editing text with the PDF Editor.

**3** In the Save As dialog box, select a new name and location for the file, or leave the original name and location selected to replace the original file with the uneditable version.

### Preferences for the PDF Editor

You can access the PDF Editor preferences options by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS) and then selecting New Document in the list under Categories.

**Font** Specifies the font family that will be used by default for typing on a new, blank page.

**Size** Specifies the font size of the default font.

**Default Margins** Specifies the measurements of the insets from the edges of the page: Left, Right, Top, and Bottom.

**Size (under Default Page)** Specifies the standard paper size, such as Letter, Tabloid, A4, and so on.

**Orientation** Specifies whether the longer side of the page runs horizontally (Landscape) or vertically (Portrait).

## Scan a paper document to PDF

You can create a PDF file directly from a paper document, starting within Acrobat and using your scanner. In Windows XP, Acrobat supports TWAIN scanner drivers and Windows Image Acquisition (WIA) drivers.

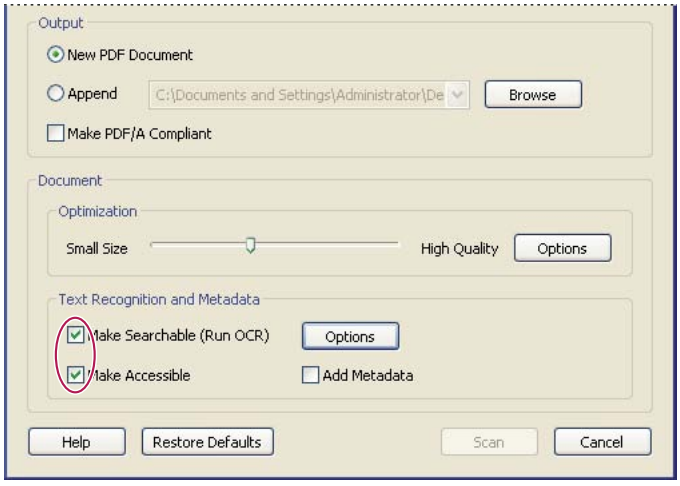
If you need to convert large numbers of paper documents to PDF archives, consider purchasing Adobe Acrobat Capture®.

### Scan a paper document directly to PDF

**1** In Acrobat, do one of the following:

- Choose File > Create PDF > From Scanner.
- Choose Document > Scan To PDF.
- Choose From Scanner from the Create PDF menu on the toolbar.

**2** In the Acrobat Scan dialog box, select basic scanning options.




***Note:*** *The Options button under Text Recognition And Metadata is not available unless Make Searchable (Run OCR) is selected.*

**3** As needed, click Scanner Options and the two Options buttons to access advanced settings for your selected scanner, Optimization Options, and Recognize Text settings.

***Note:*** *If you specify that you want to use your scanner's native interface instead of the Acrobat interface, other windows or dialog boxes appear. Consult the scanner manufacturer's documentation for more information on available options. In Mac OS, the scanner's interface is always shown.*

**4** Click Scan.

**5** Click the Scan More Pages (Put Sheet *N*+1) option if you are scanning multiple pages (where *N* is the number of pages already scanned); click Scanning Complete and OK if you are finished scanning.

### Optimize a scanned PDF

**1** Open a PDF created from a scanned document.

**2** Choose Document > Optimize Scanned PDF.

**3** Select options in the dialog box, and click OK.

The options available in the Optimized Scanned PDF dialog box also appear in the Optimization Options dialog box, which are described in detail under that heading in this topic.

### Basic scanning options

**Scanner** Select an installed scanner. You must have the manufacturer's scanning software installed on your computer.

**Scanner Options (Windows only)** Click to open the Scanner Options dialog box. (Available only after you select a scanner.)

**Sides** Specify single or double-sided scanning. If you select Both Sides and the scanner's own settings are for only one side, the scanner setting overrides the Acrobat settings.

***Note:*** *You can scan both sides of pages even on scanners that do not themselves support two-sided scanning. When Both Sides is selected, a dialog box appears after the first sides are scanned. You can then reverse the original paper documents in the tray, select the Scan Reverse Side (Put Reverse Of Sheets) option in that dialog box, and click OK to scan the back sides of the paper pages. This produces a PDF with all pages in the proper sequence.*

**Color Mode (Windows only)** Select a basic color mode (Color, Black and White, or Grayscale) supported by your scanner. This option is enabled if your Scanner Options are set to use the Acrobat scanning dialog box instead of the scanner application.

**Resolution (Windows only)** Select a resolution supported by your scanner. This option is enabled if your Scanner Options are set to use the Acrobat scanning dialog box instead of the scanner application.

***Note:*** *If you select a Color Mode or Resolution option not supported by your scanner, a message appears and your scanner's application window opens, where you can select different options.*

**New PDF Document** Select this to create a new PDF; deselect it if you want to append the scanned pages to an existing PDF.

**Append** Select this if you want to add the converted scan to an existing PDF. Use the pop-up menu to select an open PDF or click Browse to find and select another PDF.

**Make PDF/A Compliant** Select this option to make the PDF conform to ISO standards for PDF/A-1b. When selected, only Searchable Image (Exact) is available in the Recognize Text - Settings dialog box for the PDF Output Style option.

**Optimization** Drag the slider to set the balance point between file size and quality. Click the Options button if you want to customize optimization with specific settings for file compression and filtering.

**Make Searchable (Run OCR)** Select this option to make text and images in the PDF searchable and selectable. This option applies OCR and font and page recognition to the text images and converts them to normal text. Click the Options button to select specific settings in the Recognize Text - Settings dialog box. See "Recognize text in scanned documents" on page 64.

**Make Accessible** Select this option to add tags to the document, which improve accessibility for disabled users. (Available only when Make Searchable (Run OCR) is selected.)

**Add Metadata** Select this if you want to add information about the scanned document to the PDF file. When this option is selected, the Document Properties dialog box appears after scanning, where you can type in the metadata you want to add.

### Scanner Options dialog box

**Data Transfer Method** Native Mode transfers in the default mode for your scanner. Memory Mode is automatically selected for scanning in resolutions over 600 dots per inch (dpi).

**User Interface** The Hide Scanner's Native Interface option bypasses the windows and dialog boxes provided by the scanner manufacturer. Instead, scanning from Acrobat opens the Acrobat Scan dialog box.

**Paper Size** The menu lists available standard page sizes.

**Invert Black And White** This option creates positive images from black-and-white negatives, for example.

### Optimization Options dialog box

The Optimization Options dialog box for image settings controls how scanned images are filtered and compressed for the PDF. Default settings are suitable for a wide range of document pages, but you may want to customize settings for higher-quality images, smaller file sizes, or scanning issues.

**Automatic** Applies default settings to balance file size and quality at a moderate level.

- **Aggressive** Applies settings that minimize file size. In some cases, selecting this option may visibly affect the quality of the scanned PDF.

**Custom Settings** Makes additional settings available under Compression and Filtering and disables the Aggressive setting under Automatic. If you select Custom Settings, the Color/Grayscale or Monochrome settings are available, depending on the option you selected in the Acrobat Scan dialog box.

**Color/Grayscale settings** When scanning color or grayscale pages, select one of the following:

- **Lossless** Does not apply compression or filters—such as Deskew, Background Removal, and so forth—to scanned pages.

- **Adaptive** Divides each page into black-and-white, grayscale, and color regions and chooses a representation that preserves appearance while highly compressing each kind of content. Recommended scanning resolutions are 300 pixels per inch (ppi) for grayscale and RGB input, or 600 ppi for black-and-white input.

- **JPEG** Applies JPEG compression to the entire grayscale or RGB input page.

***Note:*** *The scanner uses either the selected Color/Grayscale option or the selected Monochrome option. Which one is used depends on the settings you select in the Acrobat Scan dialog box or in the scanner's TWAIN interface, which may open after you click Scan in the Acrobat Scan dialog box. (By default, the scanner application dialog box does not open.)*

**Monochrome** When scanning black-and-white or monotone images, select one of the following:

- **JBIG2** Applies the JBIG2 compression method to black-and-white input pages. Settings of 0.95 or higher use the lossless method; at lower settings, text is highly compressed. Text pages typically are 60% smaller than CCITT Group 4 compressed pages, but processing is slow. Compatible with Acrobat 5.0 (PDF 1.4) and later.

***Note:*** *For compatibility with Acrobat 4.0, use a compression method other than JBIG2.*

- **Adaptive** (As described above, under Color/Grayscale settings.)

- **CCITT Group 4** Applies CCITT Group 4 compression to black-and-white input page images. This fast, lossless compression method is compatible with Acrobat 3.0 (PDF 1.2) and later.

**Deskew** Rotates any page that is not square with the sides of the scanner bed, to make the PDF page align vertically. Choose Automatic or Off.

**Background Removal** Whitens nearly white areas of grayscale and color input (not black-and-white input).



*For best results, calibrate your scanner's contrast and brightness settings so that a scan of a normal black-and-white page has dark gray or black text and a white background. Then, Off or Low should produce good results. If scanning off-white paper or newsprint, use Medium or High to clean up the page.*

**Edge Shadow Removal** Removes dark streaks that occur at the edges of scanned pages, where the scanner light is shadowed by the paper edge. Choose Off, Cautious, or Aggressive.

**Despeckle** Removes isolated black marks in black-and-white page content. Low uses a basic peephole filter. Medium and High use both a peephole filter and a large area filter that removes larger spots farther from nearby features.

**Descreen** Removes halftone dot structure, which can reduce JPEG compression, cause moire patterns, and make text difficult to recognize. Suitable for 200–400 ppi grayscale or RGB input or, for Adaptive compression, 400–600 ppi black-and-white input. The Automatic setting (recommended) applies the filter for 300 ppi or higher grayscale and RGB input. Select Off when scanning a page with no pictures or filled areas, or when scanning at a resolution higher than the effective range.

**Halo Removal** When On (recommended), removes excess color at high-contrast edges, which may have been introduced during either printing or scanning. This filter is used only on color input pages.

## Scanning tips

- Acrobat scanning accepts images between 10 and 3000 ppi. If you select Searchable Image or Formatted Text & Graphics for PDF Output Style, input resolution of 72 ppi or higher is required, and input resolution higher than 600 ppi is downsampled to 600 ppi or lower.
- On the Color/Grayscale menu in the Optimization Options dialog box, apply lossless compression to a scanned image by choosing CCITT for black-and-white images or Lossless for color or grayscale images. If this image is appended to a PDF document, and the file is saved by Save, the scanned image remains uncompressed. If the PDF document is saved using Save As, the scanned image may be compressed.
- For most pages, black-and-white scanning at 300 ppi produces text best suited for conversion. At 150 ppi, OCR accuracy is slightly lower, and more font-recognition errors occur; at 400 ppi and higher resolution, processing slows and compressed pages are bigger. If a page has many unrecognized words or very small text (9 points or smaller), try scanning at higher resolution. Scan in black and white whenever possible.
- When Recognize Text Using OCR is disabled, full 10-to-3000 ppi resolution range may be used, but the recommended resolution is 72 and higher ppi. For Adaptive compression, 300 ppi is recommended for grayscale or RGB input, or 600 ppi for black-and-white input.
- Pages scanned in 24-bit color, 300 ppi, at 8-1/2–by-11 inches (21.59-by-27.94 cm) result in large images (25 MB) prior to compression. Your system may require 50 MB of virtual memory or more to scan the image. At 600 ppi, both scanning and processing typically are about four times slower than at 300 ppi.
- Avoid dithering or halftone scanner settings. These can improve the appearance of photographs, but they make it difficult to recognize text.
- For text printed on colored paper, try increasing the brightness and contrast by about 10%. If your scanner has color-filtering capability, consider using a filter or lamp that drops out the background color. Or if the text isn't crisp or drops out, try adjusting scanner contrast and brightness to clarify the scan.
- If your scanner has a manual brightness control, adjust it so that characters are clean and well formed. If characters are touching, use a higher (brighter) setting. If characters are separated, use a lower (darker) setting.

## Recognize text in scanned documents

You can use Acrobat to recognize text in previously scanned documents that have already been converted to PDF.

OCR runs with header/footer/Bates number on image PDF files.

**1** Open the scanned PDF.

**2** Choose Document > OCR Text Recognition > Recognize Text Using OCR.

**3** In the Recognize Text dialog box, select an option under Pages.

**4** (Optional) Click Edit to open the Recognize Text - Settings dialog box, and select the options you want to use.

**Recognize Text - Settings**

Optical Character Recognition (OCR) software enables you to search, correct, and copy the text in a scanned PDF. If you do not apply OCR when you create a PDF by scanning a paper document, you can apply OCR to the PDF later if you have set the scanner resolution at 72 ppi and higher.

OCR runs with header/footer/Bates number on image PDF files.

**Primary OCR Language** Specifies the language for the OCR engine to use to identify the characters.

**PDF Output Style** Determines the type of PDF to be produced. All options require an input resolution of 72 ppi or higher (recommended). All formats apply OCR and font and page recognition to the text images and convert them to normal text.

• **Searchable Image** Ensures that text is searchable and selectable. This option keeps the original image, deskews it as needed, and places an invisible text layer over it. The selection for Downsample Images in this same dialog box determines whether or not the image will be downsampled and to what extent.

• **Searchable Image (Exact)** Ensures that text is searchable and selectable. This option keeps the original image and places an invisible text layer over it. Recommended for cases requiring maximum fidelity to the original image.

• **Formatted Text & Graphics** Reconstructs the original page using recognized text, fonts, and graphic elements. The accuracy of the results depends on the scanning resolution and other factors. You may need to review and correct the OCR text in the new PDF page after scanning.

***Note:*** *The Formatted Text & Graphics option is available for only some languages.*

*Black-and-white scanning at 300 ppi produces the best text for conversion. At 150 ppi, OCR accuracy is slightly lower, and more font-recognition errors occur. For text printed on colored paper, try increasing the brightness and contrast by about 10%. If your scanner has color-filtering capability, consider using a filter or lamp that drops out the background color.*

**Downsample Images** Decreases the number of pixels in color, grayscale, and monochrome images after OCR is complete. Choose the degree of downsampling that you want to apply. Higher-numbered options do less downsampling, producing higher-resolution PDFs.

## Correct OCR text in PDFs

When you scan to Formatted Text & Graphics output, Acrobat analyzes bitmaps of text and substitutes words and characters for those bitmap areas. If the ideal substitution is uncertain, Acrobat marks the word as suspect. Suspects appear in the PDF as the original bitmap of the word, but the text is included on an invisible layer behind the bitmap of the word. This makes the word searchable even though it is displayed as a bitmap. You can accept these suspects as they are, or you can use the TouchUp Text tool to correct them.

***Note:*** *If you try to select text in a scanned PDF that does not have OCR applied, or try to perform a Read Out Loud operation on an image file, Acrobat asks if you want to run OCR. If you click OK, the Recognize Text dialog box opens and you can select options, which are described in detail under the previous topic.*

**1** Do one of the following:

• Choose Document > OCR Text Recognition > Find All OCR Suspects. All suspect words on the page are enclosed in boxes. Click any suspect word to show the suspect text in the Find Element dialog box.

• Choose Document > OCR Text Recognition > Find First OCR Suspect.

***Note:*** *If you close the Find Element window before correcting all suspect words, you can return to the process by choosing Document > OCR Text Recognition > Find First OCR Suspect, or by clicking any suspect word with the TouchUp Text tool.*

**2** In the Find option, choose OCR Suspects.

**3** Compare the word in the Suspect text box with the actual word in the scanned document, and accept, correct, or ignore the word. If the suspect was incorrectly identified as text, click the Not Text button.

**4** Review and correct the remaining suspect words, and then close the Find Element dialog box.

## Enable Fast Web View in a PDF

Fast Web View restructures a PDF document for page-at-a-time downloading (byte-serving) from web servers. With Fast Web View, the web server sends only the requested page, rather than the entire PDF. This is especially important with large documents that can take a long time to download from a server.

Check with your webmaster to make sure that the web server software you use supports page-at-a-time downloading. To ensure that the PDF documents on your website appear in older browsers, you may also want to create HTML links (versus ASP scripts or the POST method) to the PDF documents and use relatively short path names (256 characters or fewer).

### Verify that an existing PDF is enabled for Fast Web View

❖ Do one of the following:

• Open the PDF in Acrobat, and choose File > Properties. Look in the lower right area of the Description panel of the dialog box for the Fast Web View setting (Yes or No).

• (Windows only) In Windows Explorer, right-click the PDF file icon and choose Properties. Click the PDF tab and look near the bottom of the panel for the Fast Web View setting (Yes or No).

### Verify the Fast Web View Preferences setting

Follow this procedure to make sure that you have Acrobat set up to enable Fast Web View during the PDF creation process.

**1** Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).

**2** Under Categories, select Documents.

**3** On the right side of the dialog box, under Save Settings, make sure that Save As Optimizes For Fast Web View is selected, or select it now, and click OK.

### Enable Fast Web View for an existing PDF

Use this procedure after you have verified your Fast Web View Preferences setting and checked the PDF properties to be sure that the file is not already enabled for Fast Web View.

**1** Open the PDF that you want to have Fast Web View.

**2** Choose File > Save As. Select the same filename and location.

**3** When a message appears asking if you want to overwrite the existing file, click OK.

# Using the Adobe PDF printer

## Create PDFs by printing to file

In many authoring applications, you can use the Print command with the Adobe PDF printer to convert your file to PDF. Your source document is converted to PostScript and fed directly to Distiller for conversion to PDF, without manually starting Distiller. The current Distiller preference settings and Adobe PDF settings are used to convert the file. If you're working with nonstandard page sizes, create a custom page size.

***Note:*** *The Adobe PDF printer creates untagged PDFs. A tagged structure is required for reflowing content to a handheld device and is preferable for producing reliable results with a screen reader.*

### See also

"Creating accessible PDFs" on page 241

#### Create a PDF using the Print command (Windows)

**1** Open the file that you want to convert to a PDF in its authoring application, and choose File > Print.

**2** Choose Adobe PDF from the printers menu.

**3** Click the Properties (or Preferences) button to customize the Adobe PDF printer setting. (In some applications, you may need to click Setup in the Print dialog box to access the list of printers, and then click Properties or Preferences.)

**4** In the Print dialog box, click OK.

***Note:*** *By default, your PDF is saved in the folder specified in the printer port. The default location is My Documents. The filename and destination are controlled by the Prompt For Adobe PDF Filename setting in the Adobe PDF Printing Preferences dialog box.*

#### Create a PDF using the Print command (Mac OS)

**1** Open the file that you want to convert to a PDF in its authoring application, and choose File > Print.

**2** Choose Adobe PDF 8.0 from the printers menu.

**3** Choose PDF Options from the pop-up menu that is beneath the Presets menu (it may show Copies & Pages by default).

**4** For Adobe PDF Settings, choose one of the default settings, or customize the settings using Distiller. Any custom settings that you have defined are listed.

For most users, the default Adobe PDF conversion settings are adequate.

**5** For After PDF Creation, specify whether or not to open the PDF.

**6** Click Print.

**7** Select a name and location for your PDF, and click Save.

***Note:*** *By default, your PDF is saved with the same filename and a .pdf extension.*

## Adobe PDF printing preferences (Windows)

Printing preferences apply to all applications that use the Adobe PDF printer, unless you change the settings in an authoring application by using the Page Setup, Document Setup, or Print menu.

***Note:*** *The dialog box for setting printing preferences is named Adobe PDF Printing Preferences, Adobe PDF Printing Defaults, or Adobe PDF Document Properties, depending on how you access it.*

To access printing preferences:

- Click the Start button and choose Settings > Printers And Faxes. Right-click the Adobe PDF printer, and choose Printing Preferences.
- In an authoring application such as Adobe InDesign, choose File > Print. Select Adobe PDF as the printer, and click the Properties (or Preferences) button. (In some applications, you may need to click Setup in the Print dialog box to access the list of printers, and then click Properties or Preferences to customize the Adobe PDF settings.)

PDF-specific options appear in the Adobe PDF Settings tab. The Paper Quality tab and Layout tab contain other familiar options for the paper source, printer ink, page orientation, and number of pages per sheet.

***Note:*** *Printing Preferences are different from printer Properties. The Preferences include Adobe PDF-specific options for the conversion process; the Properties dialog box contains tabs of options that are available for any type of printer.*

**Adobe PDF Conversion Settings** Select a predefined set of options from the Default Settings menu or click Edit to view or change the settings in the Adobe PDF Settings dialog box.

**Adobe PDF Security** To add security to the PDF, choose one of the following options, or click Edit to view or change the security settings:

- **Reconfirm Security For Each Job** Opens the Adobe PDF - Security dialog box each time you create a PDF using the Adobe PDF printer. Specify settings in the dialog box.
- **Use The Last Known Security Settings** Uses the same security settings that were used the last time a PDF was created using the Adobe PDF printer on your computer.

**Adobe PDF Output Folder** Choose an output folder for the converted PDF, or click Browse to add or change the output folder. Choose Prompt For Adobe PDF Filename to specify a location and filename at conversion time.

**Adobe PDF Page Size menu** Select a custom page size that you have defined.

**View Adobe PDF Results** Automatically starts Acrobat and displays the converted document immediately.

**Add Document Information** Includes information such as the filename and date and time of creation.

**Rely On System Fonts Only; Do Not Use Document Fonts** Deselect this option to download fonts when creating the PDF. All your fonts will be available in the PDF, but it will take longer to create it. Leave this option selected if you are working with Asian-language documents.

**Delete Log Files For Successful Jobs** Automatically deletes the log files unless the job fails.

**Ask To Replace Existing PDF File** Warns you when you are about to overwrite an existing PDF with a file of the same name.

### See also

"Create and use a custom page size" on page 70

## Set Adobe PDF printer properties (Windows)

In Windows, you can usually leave the Adobe PDF printer's properties unchanged, unless you have configured printer sharing or set security.

***Note:*** *Printing Properties are different from printer Preferences. The Properties dialog box contains tabs of options that apply to any type of printer; the Preferences include conversion options specifically for the Adobe PDF printer.*

#### Set Adobe PDF printer properties

1 Open the Printers window from the Start menu, and right-click the Adobe PDF printer.

2 Choose Properties.

3 Click the tabs, and select options as needed.

#### Reassign the port that the Adobe PDF printer uses

1 Quit Distiller if it is running, and allow all queued jobs to the Adobe PDF printer to complete.

2 Open the Printers window from the Start menu.

3 Right-click the Adobe PDF printer, and choose Properties.

4 Click the Ports tab, and then click Add Port.

5 Select Adobe PDF Port from the list of available port types, and click New Port.

6 Select a local folder for PDF output files, and click OK. Then click Close to quit the Printer Ports dialog box.

7 In the Adobe PDF Properties dialog box, click Apply, and then click OK.

*For best results, select a folder on the same system where Distiller is installed. Although remote or network folders are supported, they have limited user access and security issues.*

#### Delete a folder and reassign the Adobe PDF printer to the default port

1 Quit Distiller if it is running, and allow a few minutes for all queued jobs to Adobe PDF to complete.

2 Open the Printers window from the Start menu.

3 Right-click the Adobe PDF printer, and choose Properties.

4 Click the Ports tab.

5 Select the default port, My Documents, and click Apply.

6 Select the port to delete, click Delete Port, and then click Yes to confirm the deletion.

7 Select the My Documents port again and click Close.

## Configure the Adobe PDF printer (Mac OS)

In Mac OS, you must configure the Adobe PDF printer in three places: Distiller, your authoring application's Page Setup menu, and your authoring application's Print dialog box.

1 In Distiller, specify the Adobe PDF settings, font locations, and security.

2 In an authoring application such as Adobe InDesign, choose File > Page Setup.

3 Select Adobe PDF 8.0 from the Format For menu.

4 Specify the paper size, orientation, and scale as necessary.

5 In your authoring application, choose File > Print, and select Adobe PDF 8.0 from the Printer menu.

6 In the pop-up menu below the Presets menu, choose PDF Options, and set any of the following options:

- Select a set of predefined conversion settings from the Adobe PDF Settings menu if you want to override default settings. Default settings are the settings currently defined in Distiller.
- Specify whether to open the converted files in Acrobat in the After PDF Creation menu.

7 Specify print settings as desired in the other menus available in the pop-up menu below the Presets menu.

## Create and use a custom page size

It's important to distinguish between *page size* (as defined in the source application's Document Setup dialog box for your document) and *paper size* (the sheet of paper, piece of film, or area of the printing plate you'll print on). Your page size might be U.S. Letter (8-1/2-by-11 inches or 21.59-by-27.94 cm), but you might need to print on a larger piece of paper or film to accommodate any printer's marks or the bleed area. To ensure that your document prints as expected, set up your page size in both the source application and the printer.

The list of paper sizes available to Acrobat comes from the PPD file (PostScript printers) or from the printer driver (non-PostScript printers). If the printer and PPD file you've chosen for PostScript printing support custom paper sizes, you see a Custom option in the Paper Size menu. For printers capable of producing very large print areas, Acrobat supports pages as large as 15,000,000 inches (38,100,000 cm) by 15,000,000 inches (38,100,000 cm).

### Create a custom page size (Windows)

**1** Do one of the following:

- Open the Printers or Printer And Faxes window from the Start menu. Right-click the Adobe PDF printer, and choose Printing Preferences.
- In an authoring application such as Adobe InDesign, choose File > Print. Select Adobe PDF as the printer, and click the Properties button. (In some applications, you may need to click Setup in the Print dialog box to access the list of printers, and then click Properties or Preferences to customize the Adobe PDF settings.)

**2** In the Adobe PDF Settings tab, click the Add button next to the Adobe PDF Page Size menu.

**3** Specify the name, width, height, and unit of measurement. Click Add/Modify to add the custom page size name to the Adobe PDF Page Size menu.

### Create a custom page size (Mac OS)

**1** In an authoring application such as Adobe InDesign, choose File > Page Setup.

**2** In the Settings pop-up menu, select Custom Paper Size.

**3** Click the New button.

**4** Specify the name, height, width, and margins. The unit of measurement depends on the system language.

**5** Click Save, and then click OK.

### Use the custom page size

**1** Choose File > Print Setup.

**2** Select the new custom page size from the Paper Size menu, and click OK.

# Creating PDFs with PDFMaker

## About Acrobat PDFMaker

PDFMaker is an Acrobat feature that operates within many business applications, such as Microsoft Office applications and Lotus Notes. When you install Acrobat, PDFMaker controls appear in the work area of the authoring application.

Using PDFMaker within an authoring application is a simple, one-click procedure. It involves clicking an Acrobat PDFMaker toolbar button or (Windows only) choosing a command on the Adobe PDF menu. It is not necessary to open Acrobat.

## Use PDFMaker to convert a file to PDF (Windows)

In Windows, Acrobat installs both an Acrobat PDFMaker toolbar and an Adobe PDF menu in many popular authoring applications. You can use either the toolbar buttons or the Adobe PDF menu (the Action menu in Lotus Notes) to create PDFs, but the menu also provides access to conversion settings. Although many of the conversion options are common to all authoring applications, a few are application-specific.

For Microsoft Office 2007 applications such as Word, Excel, and PowerPoint, the options for creating PDFs are available from the Acrobat Ribbon.

***Note:*** *If you don't see the PDF toolbar buttons in an application, choose View > Toolbars > Acrobat PDFMaker 8.0. Or, in Lotus Notes only, choose File > Preferences > Toolbar Preferences, click Toolbars, and select the Visible check box for Acrobat PDFMaker 8.0.*

### See also

"Customize Adobe PDF settings" on page 94

"Create PDFs from Word mail merges" on page 77

#### Convert a file to PDF

**1** Open the file in the application used to create it.

**2** Click the Convert To Adobe PDF button on the Acrobat PDFMaker toolbar, or (if available) choose Adobe PDF > Convert To Adobe PDF. (In Lotus Notes only, PDF conversion commands appear on the Actions menu.)

For Microsoft Office 2007 applications such as Word, Excel, PowerPoint, and Access, click the Create PDF button on the Acrobat Ribbon.

**3** In the Save Adobe PDF File As dialog box, enter a filename and location for the PDF, and click Save.

#### Create a PDF as an email attachment

**1** Open the file in the application used to create it.

**2** Choose Adobe PDF > Convert To Adobe PDF And Email.

For Microsoft Office 2007 applications such as Word, Excel, PowerPoint, and Access, click the Create And Attach To Email button on the Acrobat Ribbon.

When the conversion is finished, a blank message with the new PDF included as an attachment automatically opens in your default email application. You can then address and complete the message and either send it or save it as a draft.

#### Attach a file as PDF (Outlook)

**1** In the Outlook email Message window, click the Attach As PDF button.

***Note:*** *If the Attach As PDF button isn't visible, in Outlook, choose Adobe PDF > Change Conversion Settings, and then select Show Attach As Adobe PDF Buttons. The Attach As PDF button is not available for Outlook 2007.*

**2** Select a file to attach, and click Open.

### Convert files to a secured PDF and attach it to an email message (Outlook)

1 In the Outlook email Message window, click the Attach As Secured Adobe PDF button .

***Note:*** *The Attach As Secured Adobe PDF button appears only after you've configured an Adobe LiveCycle Policy Server using the Advanced > Security Settings menu.*

2 Click Browse, select a file to convert, and click Open.

3 Specify the users that can open the PDF, and then click OK:

- To specify only users that receive the PDF, select Restrict Access Only To People In This Message's To:, Cc:, And Bcc: List. In this case, the PDF isn't secured until you send the email message.
- To specify only users that are specified by a security policy, select Restrict Access By Applying The Following Security Policy, and then select a security policy in the list. In this case, the PDF is secured before it is attached to the email message.

4 If prompted, enter your user name and password to log in to the Adobe Policy Server.

### Create a PDF and send it for review

1 Open the file in the application used to create it.

2 Click the Convert To Adobe PDF And Send For Review button on the Acrobat PDFMaker toolbar, or (if available) choose Adobe PDF > Convert To Adobe PDF And Send For Review.

For Microsoft Office 2007 applications such as Word, Excel, PowerPoint, and Access, click the Create And Send For Review button on the Acrobat Ribbon.

3 When the Identity Setup dialog box appears, enter the appropriate information about yourself, and click Complete.

4 Follow the directions in the wizard that appears, as described in "Start an email-based review" on page 147.

## Use PDFMaker to convert a file to PDF (Mac OS)

The default Acrobat installation adds Convert To Adobe PDF buttons to Office application toolbars. You can use these buttons to create Adobe PDF files quickly and easily from Microsoft Word, Excel, and PowerPoint files without opening Acrobat.

The PDF creation process applies the currently selected conversion settings. If you want to change those settings, you must open Acrobat Distiller and select options there. In most cases, the default settings produce good results.

***Note:*** *Password-protected Excel files can't be converted to PDF on Mac OS. Also, many PowerPoint features aren't converted when you produce a PDF from a PowerPoint file on Mac OS. For example, animations and transitions aren't converted.*

1 Open the file in the Office application.

2 On the Adobe Acrobat PDFMaker 8 toolbar, select one of the following:

- Convert To Adobe PDF.
- Convert To Adobe PDF And EMail.

3 In the Save dialog box, type a filename, select a folder in which to save the PDF, and click Save.

4 When the conversion is complete, choose View File if you want to open the new PDF in Acrobat, or Done if you want to close the Acrobat PDFMaker status dialog box without opening the PDF.

If you selected Convert To Adobe PDF And Email, the newly created PDF is attached to a blank email that opens in your default email application. You can either address, complete, and send the message immediately or save it as a draft to send later.

### See also

"Customize Adobe PDF settings" on page 94

## View PDFMaker conversion settings

PDFMaker conversion settings vary according to file types. For example, the options available for PowerPoint files aren't the same as those available for Outlook files. Once you've selected conversion settings, those choices apply to all subsequent PDFs you create from that file type. It's a good idea to review the settings occasionally.

**1** Open a PDFMaker-enabled application (such as Word or Excel).

**2** Do one of the following:

- (Lotus Notes) Choose Actions > Change Adobe PDF Conversion Settings.
- (Office 2007 applications) Choose Acrobat > Preferences.
- (All other applications) Choose Adobe PDF > Change Conversion Settings.

**3** (Optional) To revert to the original default settings, click Restore Defaults on the Settings tab.

***Note:*** *PDFMaker isn't available for email applications on Mac OS.*

### See also

"Application-specific features of PDFMaker" on page 74

"Adobe PDF conversion settings" on page 92

#### Settings tab of the Conversion Settings

The settings available for PDFMaker depend on the application in which you're using PDFMaker.

**Conversion Settings** Specifies the standard by which the PDF will be optimized. When you choose an item in the menu, a description of that preset appears immediately below it.

**View Adobe PDF Result** Opens the converted document directly into Acrobat. (Exception: when you choose Convert To Adobe PDF And Email.)

**Prompt For Adobe PDF File Name** Lets you enter a custom filename for the resulting PDF. Deselect this option to save the file in the same folder as the source file, using the same name but with a .pdf extension.

**Convert Document Information** Adds document information from the Properties dialog box of the source file. This setting overrides the printer preferences and settings in the Advanced panel of the Adobe PDF Settings dialog box.

***Note:*** *The Advanced Settings button opens the Adobe PDF Settings dialog box, which contains many additional conversion options. These conversion settings apply to all Acrobat features that create PDFs, such as Acrobat Distiller, PDFMaker, and the Acrobat application itself.*

**Create PDF/A Compliant PDF File** Creates the PDF so that it conforms to this ISO standard for long-term preservation of electronic documents. (In the Microsoft Publisher application alone, PDFMaker does not support the PDF/A standard.)

***Note:*** *When Conversion Settings are opened from within Word, Excel, or PowerPoint, this option specifies PDF/A 1-a:2005. When opened from within Access or Publisher, it specifies PDF/A 1-b:2005.*

#### Security tab of the Conversion Settings

The settings available for PDFMaker depend on the application in which you're using PDFMaker.

**Require A Password To Open The Document** When selected, makes the Document Open Password option available, where you type to set a password that users must use in order to open the document.

**Restrict Editing And Printing Of The Document** When selected, makes the other Permissions options available.

**Change Permissions Password** Specifies a password you set that users must use in order to do any allowable printing or editing.

**Printing Allowed** Specifies whether users who use the Permissions Password can print the document and at what resolution.

**Changes Allowed** Specifies what kind of changes users who use the Permissions Password can make.

**Enable Copying Of Text, Images, And Other Contents** Prevents or allows users from copying from the PDF.

**Enable Text Access For Screen Reader Devices For The Visually Impaired** Prevents or allows screen reader devices to access text. (Selected by default.)

**Enable Plaintext Metadata** Specifies whether or not the search engine can access the document metadata. Available only when the PDF-compatibility is set to Acrobat 6.0 (PDF 1.5) or later.

# Application-specific features of PDFMaker

## Convert email messages to PDFs (Windows)

You can use PDFMaker to convert one or more Microsoft Outlook or Lotus Notes email messages or entire folders of messages to a merged PDF or PDF package. Within a package, each email message appears as a separate PDF file.

The Acrobat PDFMaker Conversion Settings dialog box contains the option that determines whether email messages are merged into one continuous PDF or assembled into a PDF package.

The controls that activate an email conversion to PDF appear in two places within the email application: on the Acrobat PDFMaker toolbar and on a menu. In Outlook, the menu is called Adobe PDF and appears to the right of the Outlook Help menu. In Lotus Notes, PDF commands appear under the Actions menu.


*You can convert one currently open email message to PDF (not to a PDF package) by choosing File > Print, and selecting Adobe PDF as the printer in the Print dialog box. The PDFMaker conversion settings do not affect this process.*

### See also

"Application-specific PDFMaker settings" on page 79

#### Specify whether email messages become merged PDFs or PDF packages

**1** Do one of the following:

- (Outlook) Choose Adobe PDF > Change Conversion Settings.
- (Lotus Notes) Choose Actions > Change Adobe PDF Conversion Settings.

**2** Do one of the following:

- To convert and merge email messages into a PDF as sequential pages of one document, deselect Output Adobe PDF Package When Creating A New PDF File.
- To assemble converted email messages as components of a PDF package, select Output Adobe PDF Package When Creating A New PDF File.

### Convert an open email message to PDF (Outlook)

❖ Choose Adobe PDF > Convert To Adobe PDF.

*You can also convert a different file to PDF from within an open Outlook email message if the Attach As Adobe PDF toolbar is shown. Clicking this button opens a series of dialog boxes for selecting and saving the new PDF and also starts Acrobat, if it is not already running. The resulting PDF is attached to the open email message.*

### Convert email messages to a new PDF

**1** In Outlook or Lotus Notes, select the individual email messages that you want to archive.

**2** Do one of the following:

- (Outlook) Click the Convert Messages button in the Acrobat PDFMaker toolbar, or choose Adobe PDF > Convert To Adobe PDF > Selected Messages.
- (Lotus Notes) Click the Convert Selected Messages To Adobe PDF button in the Acrobat PDFMaker toolbar, or choose Actions > Convert Selected Messages To Adobe PDF.

**3** In the Save Adobe PDF As dialog box, select a location, type a filename, and click Save.

***Note:*** *For security reasons, the default settings in Outlook 2003 block automatic downloading of pictures in HTML email messages from unknown senders and sites. If you want to download such images and include them in the conversion to PDF, you can change that setting in Outlook by choosing Tools > Options, clicking the Security tab, and then clicking the Change Automatic Download Settings, where specific options are available. For more information, see the Outlook Help system.*

### Add email messages to an existing PDF

**1** In Outlook or Lotus Notes, select the individual email messages that you want to convert and add to a PDF.

**2** Do one of the following:

- (Outlook) Choose Adobe PDF > Convert And Append To Existing Adobe PDF > Selected Messages.
- (Lotus Notes) Choose Actions > Append Selected Messages To Existing Adobe PDF.

**3** Locate and select the PDF or PDF package to which you want to add the converted emails, and click Open.

***Important:*** *Do not type a new name for the PDF. If you do, a warning message appears telling you that the PDF was not found. Click OK, and select a PDF without changing its name.*

**4** (Outlook only) If a message appears, alerting you that the existing PDF was creating using an earlier version of PDFMaker, do one of the following:

- To create a PDF package from the original PDF archive, click Yes, and select a name and location for the new archive. (The default name adds *_Packaged* to the original PDF filename.) When the conversion is complete and the Creating Adobe PDF dialog box closes, the new archive opens in Acrobat.
- To not create a PDF package from the original PDF archive, click No and cancel the process.

***Note:*** *In earlier versions of Acrobat and for email merged into a single PDF, messages might be duplicated when running the append process. For PDF packages of email converted or migrated in Acrobat 8, only new messages—that is, messages that are not already part of the PDF package—are appended.*

#### (Lotus Notes) Convert an email folder to a new PDF

**1** In Lotus Notes, select the folder that you want to convert to PDF.

**2** Click the Convert Selected Folder To Adobe PDF button on the Acrobat PDFMaker toolbar, or choose Actions > Convert Selected Folder To Adobe PDF.

**3** In the Save Adobe PDF File As, specify a location and name for the PDF package, and click Save.

To convert other Lotus Notes folders to PDF, repeat this procedure for each folder.

#### (Outlook) Convert email folders to a new PDF

In Outlook, PDFMaker can convert multiple folders to PDF in one procedure. It is not necessary to select those folders at the beginning of the process because you can make these selection in a dialog box that appears automatically.

**1** In Outlook, choose Adobe PDF > Convert To Adobe PDF > Selected Folders.

**2** In the Convert Folder(s) To PDF dialog box, select the folders you want to convert, and then select or deselect the Convert This Folder And All Sub Folders option.

**3** In the Save Adobe PDF File As, select a location and name for the PDF package.

The Creating Adobe PDF status dialog box shows the progress of the conversion. When the conversion is complete, the new PDF opens in Acrobat.

## Migrating old Outlook PDF archives to PDF packages (Windows)

There are two good reasons for migrating old PDF email archives to PDF packages: to facilitate sorting and other functions, and to make it possible to add new email messages to those archives.

In PDF packages, each email message is converted as a component PDF. You can then sort the messages by message folder, sender, subject line, date, size, or attachments. Also, you can create custom categories and sort by those.

You can open email archives you created with earlier version of Acrobat in Acrobat 8.0, but you cannot add email messages to that archive in the same way. If you try, messages will appear that will guide you through the process of creating a new archive from the old one and appending the selected messages to the new PDF package archive.

## Migrate old Outlook PDF archives to PDF packages (Windows)

**1** Open Outlook.

**2** Choose Adobe PDF > Migrate Old PDF Archives To PDF Packages.

**3** If a message appears, click Yes to continue the migration process.

**4** Locate and select the old PDF archive, and click Open.

**5** Select a location and name for the migrated PDF package, and click Save. (The default naming adds *_Packaged* to the existing filename, such as renaming an archive called *Inbox.pdf* as *Inbox_Packaged.pdf*.)

When the conversion process is complete and the Creating Adobe PDF dialog box closes, the new archive opens in Acrobat.

## Set up automatic email archiving (Windows)

In Microsoft Outlook, you can set up PDFMaker to automatically archive your email messages.

**1** In Outlook, choose Adobe PDF > Setup Automatic Archival.

**2** On the Automatic Archival tab of the Acrobat PDFMaker dialog box, select Enable Automatic Archival, and then select options for Frequency and the time of day at which automatic archiving occurs.

**3** Select other options, according to your needs:

**Maintain Log Of Archival** Creates a record of each archiving session.

**Choose File** Specifies the name and location of the archiving log.

**Embed Index For Faster Search** Creates an index that you can search to find specific words or characters instead of having to search each individual document.

**4** Click Add, and select the email folders and subfolders that you want PDFMaker to archive. Then select or deselect the Convert This Folder And All Sub Folders option, as preferred, and click OK.

**5** In the Save PDF Archive File As dialog box, select a name and location for the archived email PDF. Then click Open.

**6** Review the settings and the archive folder names listed in the Acrobat PDFMaker dialog box, and do any of the following:

- To add other email folders to the list, click Add and select the folder.
- To remove folders from the list, select the ones you want to remove and click Delete.
- To make changes to an archive file, select any folder name on the list, click Change Archive File, and specify the name and location.
- To start archiving email immediately, click Run Archival Now.

## Create PDFs from Word mail merges

Mail merges from Word generate documents like form letters—for one common example—which are personalized with information like the names and addresses of the individuals to whom they will be sent. With Acrobat PDFMaker, you can save steps by using a Word mail merge document and corresponding data file to output mail merges directly to PDF. You can even set up PDFMaker to attach those PDFs to email messages that are generated during the PDF-creation process.

***Note:*** *For more information on setting up files for the Word Mail Merge feature, see Microsoft Office Word Help.*

**1** In Microsoft Word, open the template that you have created as the basis of your mail merge, or create the file using the Word Mail Merge toolbar and Mail Merge wizard, as needed.

***Important:*** *Do not complete the mail merge in Word. Instead, set up and preview the mail merge as usual, so that you can verify that the merge will work correctly.*

**2** Do one of the following:

- Choose Adobe PDF > Mail Merge To Adobe PDF.
- Click the Mail Merge To Adobe PDF button on the Mail Merge toolbar (View > Toolbars > Mail Merge).
- (Word 2007) Choose Acrobat > Mail Merge.

**3** In the Acrobat PDFMaker - Mail Merge dialog box, select the options you want:

- To specify which records in the data file will be imported into the merged files, select All or Current, or enter a range of pages by typing in the From and To boxes.

- To name the PDF that will be created, type in the Specify PDF File Name box.

***Note:*** *The PDF will be named using this text plus a series of numbers. For example, if you type* ***JulyLetter*** *in the Specify PDF File Name box, the mail-merged PDFs might appear as JulyLetter_0000123, JulyLetter_0000124, July Letter_0000125, and so forth.*

**4** For Automatically Send Adobe PDF Files By Email, do one of the following:

- To create and save merged PDFs for printing or sending later in email, leave the option deselected, and click OK.
- To create merged PDFs and attach each one to an email message to the appropriate recipient, select this check box, and fill in the other Email options.

**5** When the Browse For Folder dialog box appears, navigate to the location you want to use and click OK.

Status indicators appear as PDFMaker generates the individual PDFs, which takes an amount of time that is proportional to the complexity of the merge and the number of PDFs you create.

**6** If you selected Automatically Send Adobe PDF Files By Email, a dialog box appears asking for your email profile. Enter the appropriate information and click OK.

When the job is finished, a message appears, telling you that the process was successful.

#### Email options for PDF mail merges

**To** Use the pop-up menu to select the field or column in the associated data file that contains the email addresses in each individual's record.

**Subject Line** Type the text that you want to appear in the subject line of each message.

**Message** Type to add or edit text that you want to appear in the body of the email messages.

## PDFs from Microsoft Project, Publisher, and Access (Windows)

There are specific differences to be aware of when you create PDFs from files authored in these applications:

**Microsoft Project** You can create PDFs of only the currently selected view. Views designated as nonprintable in Project cannot be converted to PDF.

***Note:*** *Converting Project files requires Acrobat Professional or Acrobat 3D.*

**Microsoft Publisher** PDFs converted from Microsoft Publisher support crop marks, links, bookmarks, spot colors, transparency, bleed marks, printing bleed marks, and CMYK color conversion.

**Microsoft Access** When creating PDFs from Access files, the process can involve two additional steps:

- You must select the object in the Access file to be created as a PDF before using the PDFMaker button or command.
- You can choose Adobe PDF > Convert Multiple Reports To Single Adobe PDF. For Access 2007, click Acrobat and then click Convert Multiple Report. You can select individual reports that you want to include, and click Add Report(s). When all of the reports that you want to convert appear in the Reports In PDF list, click Convert to start creating the PDF.

***Note:*** *When you convert an Access 2003 or Access 2002 file to PDF, Access reports, tables, queries, and forms are converted. When you convert an Access 2000 file to PDF, only reports are converted.*

## Application-specific PDFMaker settings

PDFMaker is a flexible feature of Acrobat that adapts according to its environment. The conversion settings available in one PDFMaker-enabled application may be different than those you would encounter within a different application.

Some PDFMaker settings are common to several or most applications. Some options are unique to a specific application.

### See also

"Adobe PDF conversion settings" on page 92

"Convert web pages to PDF in Internet Explorer (Windows)" on page 82

"Settings for a single conversion for Office 2007 applications" on page 81

#### Settings tab options available from within most applications

The following settings appear on the Settings tab accessed from within most PDFMaker-enabled applications.

**Attach Source File To Adobe PDF** Includes the document being converted as an attachment to the PDF.

**Add Bookmarks To Adobe PDF** Converts certain elements in original Office documents to PDF bookmarks: Word headings, Excel worksheet names, or PowerPoint titles. Selecting this option overrides any settings in the Bookmarks tab of the Conversion Settings dialog box.

***Note:*** *In Microsoft Publisher 2003 documents, PDFMaker includes Publisher headings as bookmarks in the PDF. PDFMaker does not support the conversion of Publisher 2002 bookmarks, links, transparency, or crop marks and bleed marks.*

**Add Links To Adobe PDF** Includes active links and hypertext in the PDF.

**Enable Accessibility And Reflow With Tagged Adobe PDF** Embeds tags in the PDF.

#### Excel-specific options on the Settings tab

**Convert Comments To Notes** Converts user-created Excel comments to notes and lists them in the Acrobat Comments panel.

**Fit Worksheet To A Single Page** Adjusts the size of each worksheet so that all the entries on that worksheet appear on the same page of the PDF.

**Prompt For Selecting Excel Sheets** Opens a dialog box at the beginning of the file conversion process, in which you can specify which worksheets are included in the PDF and the order in which the sheets appear in the PDF.

#### PowerPoint-specific options on the Settings tab

**Convert Multimedia To PDF Multimedia** Adds any linked audio-video files to the PDF.

**Save Animations In Adobe PDF** Converts any animation effects in the PowerPoint file to equivalent animations in the PDF.

**Save Slide Transitions In Adobe PDF** Converts PowerPoint slide transition effects to PDF transition effects.

**Convert Hidden Slides To PDF Pages** Converts any PowerPoint slides that are not seen in the usual playing of the presentation to PDF pages.

**Convert Speaker Notes To Text Notes In Adobe PDF** Converts any speaker notes for the PowerPoint presentation into Text notes in the PDF.

**PDF Layout Based On PowerPoint Printer Settings** Uses the same printer settings in the PDF as in the original file.

### Email-specific options on the Settings tab

The following options appear when you open the PDFMaker settings from within Microsoft Outlook or Lotus Notes.

**Attachments** Indicates whether or not all files attached to email messages will be included in the new PDF.

**Output Adobe PDF Package When Creating A New PDF File** When selected, always converts individual messages as component files of a PDF package. When deselected, merges individual messages as separate pages of a PDF.

**Embed Index For Faster Search** Creates an embedded index, which speeds up searches, especially when you convert large numbers of email messages or message folders.

**Show "Attach As Adobe PDF" Buttons** If selected, the Attach As Adobe PDF button appears in the Outlook email message window.

**Page Layout options** Specify page properties, similar to those found in the Print dialog box: page dimensions, orientation, and margins.

### Visio-specific options on the Settings tab

The following options appear when you open the PDFMaker settings from within Microsoft Visio.

**Include Visio Custom Properties As Object Data In The Adobe PDF** Indicates whether or not custom properties of the Visio image will be included as object data in the new PDF.

**Exclude Visio Objects With No Custom Properties** Indicates if the new PDF should exclude Visio objects without custom properties.

**Convert Comments To Adobe PDF** Indicates if the comments in the Visio file should be converted to PDF comments in the new PDF.

**Always Flatten Layers In Adobe PDF** Specifies if the layers should be flattened. If you flatten layers, the PDF will look like the original drawing, but won't contain any layer information. All shapes in the Visio drawing are converted, regardless of their protection or behavior, and shape custom properties can be converted to PDF object data.

### Word 2007-specific options on the Settings tab

The following options appear when you open the PDFMaker settings from within Microsoft Word 2007.

**Fully Functional PDF** creates a fully functional, high-quality, and compact PDF file.

**Quick And Simple PDF** Creates a basic PDF file for viewing. The Bookmark and Word tab settings are not available for quick and simple PDFs.

### Word tab settings (Microsoft Word)

**Convert Displayed Comments To Notes In The Adobe PDF** Changes any Word comment entries to PDF comments. If the currently open Word document contains comments, more options appear in the Comments list on this tab:

- **Reviewer** Lists the names of reviewers who have entered comments in the current Word document.
- **Include** When deselected, does not include that reviewer's comments in the PDF.
- **Notes Open** Specifies whether the PDF comment windows automatically open or are closed for that reviewer's comments.
- **Color** Shows the color for that reviewer's comment icons. Clicking the color icon repeatedly cycles through a limited set of available colors.

**Convert Cross-References And Table Of Contents To Links** Enables one-click navigation of these elements in the new PDF.

**Convert Footnote And Endnote Links** Integrates these into the PDF.

**Enable Advanced Tagging** Integrates this into the PDF.

#### Bookmarks tab settings (Microsoft Word)

The options you specify on this tab determine which items are converted into PDF bookmarks in the PDF.

***Important:*** *The Add Bookmarks To Adobe PDF option on the Settings tab must be selected in order to include any bookmarks in the conversion process. If you deselect that option, it overrides any options you select on this tab and no bookmarks will be created.*

**Convert Word Headings To Bookmarks** Selects all the headings in the Elements list for conversion to PDF bookmarks.

**Convert Word Styles To Bookmarks** Selects all the text styles in the Elements list for conversion to PDF bookmarks. (Deselected by default.)

**Convert Word Bookmarks** Converts any user-created Word bookmarks to PDF bookmarks.

**Element list** Specifies which Word headings and styles will be converted as PDF bookmarks.

- **Element** Lists the names of all available Word headings and styles. The icons for Headings and Styles ¶ indicate the element types.
- **Type** Also indicates whether the element is a heading or style in the Word document.
- **Bookmark** Displays X's, indicating whether or not individual elements will be converted to PDF bookmarks. Clicking an individual Bookmark check box changes the selection status for that element.
- **Level** Specifies where the element will fit in the hierarchy structure of the PDF Bookmarks panel. Clicking an individual Level number opens a menu that you can use to change the value.

***Note:*** *When some but not all of the available Word headings and styles are selected for conversion to PDF bookmarks, the marker in the corresponding check boxes at the top of the tab change. If all elements of the type are selected, a check mark appears. If only some of the elements of that type are selected, a colored square appears. Otherwise, the check box is empty.*

## Settings for a single conversion for Office 2007 applications

For Word 2007, Excel 2007, and PowerPoint 2007 applications, if you want the settings to be used only for the selected conversion and not for future conversions, you can define the settings by accessing the conversion options from the Save Adobe PDF File As dialog box.

#### View and modify options for a single conversion

1. Click the Office button and choose Save As > Adobe PDF.
2. Select the View Result check box if you want to view the PDF file after the conversion is complete.
3. (Word 2007) Specify if you want the PDF to be complete and fully functional or if you just need a quick and simple PDF. The quick and simple PDF option does not allow you to create bookmarks from Word styles.
4. Click Adobe PDF Conversion Options to define the options to be used for the current conversion.

The initial settings in the Conversion Options dialog box are based on the options that you set using the Preferences button on the Acrobat Ribbon.

# Converting web pages to PDF

## Web pages and PDFs

The core of a web page is a file written in Hypertext Markup Language (HTML). Typically, the HTML file includes associations with other files that either appear on the web page or govern how it looks or works.

When you convert a web page to PDF, the HTML file and all associated files—such as JPEG images, Adobe Flash files, cascading style sheets, text files, image maps, and forms—are included in the conversion process.

The resulting PDF behaves much like the original web page. For example, the images, links, image maps, and most media files appear and function normally within the PDF. (Animated GIF files appear as still images, showing the last frame of the animation.)

Also, the PDF functions like any other PDF. For example, you can navigate through the file by scrolling or using bookmarks; users can add comments to it; you can add security, form fields, and other features that enhance it.

In preparing to convert web pages to PDF, there are decisions to consider that affect how you approach the conversion process:

- How much do you want to convert?

If you want to convert only a selected area of the currently open web page, use PDFMaker from within Internet Explorer. If you want to convert several levels or all of a multipage web site to PDF, work within Acrobat.

- Do you want to create a new PDF from the web pages or to append the converted pages to an existing PDF?

You can do this in either Acrobat or Internet Explorer PDFMaker, but you choose different buttons or commands to accomplish these things.

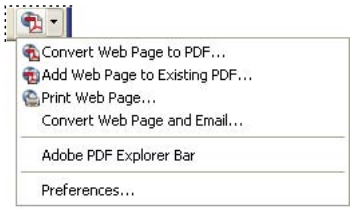
- Do you need to apply advanced conversion settings to the process?

The conversion settings available from within Internet Explorer are limited. Use Acrobat for the conversion process if you need to select additional settings. When you finish your selections and have converted at least one web page to PDF from within Acrobat, those settings will apply when you convert web pages from within Internet Explorer, too.

***Note:*** *To convert Chinese, Japanese, and Korean (CJK) language web pages to PDF on a Roman (Western) system in Windows, you must have installed the CJK language support files while installing Acrobat. Also, it is preferable to select an appropriate encoding from the HTML conversion settings.*

## Convert web pages to PDF in Internet Explorer (Windows)

When you install Acrobat, Internet Explorer (version 6.0 and later) gains an Adobe PDF toolbar. Using the commands on this toolbar, you can convert the currently displayed web page to PDF in various ways: You can convert the entire web page or just a selected part of it; you can create a new PDF or append the converted web page to an existing PDF. The Adobe PDF toolbar menu also contains commands that initiate further actions after conversion, such as attaching the new PDF to a new email message or printing it.




*A menu on the PDF toolbar provides easy conversion and print capabilities.*

### Convert a web page to PDF

**1** Start Internet Explorer and go to the web page that you want to convert to PDF.

**2** Using the Adobe PDF toolbar menu, do one of the following:

***Note:*** *If you don't see the Adobe PDF toolbar in Internet Explorer, choose View > Toolbars > Adobe PDF.*

- To create a new PDF from the currently open web page, choose Convert Web Page To PDF. Then select a location, type a filename, and click Save.
- To add a PDF of the currently open web page to another PDF, choose Add Web Page To Existing PDF. Then locate and select the PDF to which the converted file will be added, and click Save.
- To create and print a new PDF from the currently open web page, choose Print Web Page. When the conversion is complete and the Print dialog box opens, select options and click OK.
- To create a new PDF from the currently open web page and attach it to a blank email message, choose Convert Web Page And Email. Then select a location for the PDF, type a filename, and click Save. Type the appropriate information in the email message that opens after the conversion is complete.

### Convert part of a web page to PDF

You can convert text or images on a web page. This is useful if you want to save content without saving navigation frames or advertising.

**1** Drag the pointer to select text and images on a web page.

**2** On the Adobe PDF toolbar menu, choose one of the following:

- To create a new PDF, choose Convert Web Page To PDF. Then select a name and location for the PDF.
- To append the selected content to another PDF, choose Add Web Page To Existing PDF. Then locate and select the PDF to which the selection will be added.

**3** Make sure that Only Convert Selection is selected, and click Save.

### Convert a linked web page to PDF

❖ In the open web page, right-click the linked text and choose one of the following:

- To convert the linked web page to a new PDF, choose Convert Link Target To Adobe PDF.
- To add the linked web page to an existing PDF, choose Convert Link Target To Existing PDF. Then locate and select the existing PDF, and click Save.

### Set PDF conversion preferences for Internet Explorer (Windows)

The Internet Explorer PDF preferences determine only whether converted files open in Acrobat automatically, and whether you are prompted to confirm the deletion of files or addition of pages to an existing PDF.

**1** In Internet Explorer, choose Preferences from the Adobe PDF toolbar menu.

**2** Select and deselect options in the Adobe PDF Preferences, as needed:

- To continue working in Internet Explorer after the conversion without opening the new PDF in Acrobat, deselect Open PDF Files In Acrobat After Conversion.
- To delete PDF files without further notice, deselect Ask For Confirmation Before Deleting PDF Files.
- To append PDF files without further notice, deselect Ask For Confirmation Before Adding Pages To PDF Files.
- To skip alerts reminding you that the PDF file you are appending to has been changed, deselect Warn Before Adding Pages If The PDF File Has Been Modified.

## Manage PDFs in Internet Explorer (Windows)

You can open the Adobe PDF Explorer Bar within Internet Explorer to see PDF files and folders on your computer in a familiar navigation-tree pane and format. All other types of files do not appear, which makes it easier to find the PDFs on your computer. You can move PDFs and folders, rename them, or delete them, just like in Windows Explorer.

The Adobe PDF Explorer Bar also contains buttons for converting the current web page to PDF or creating new folders on your computer.

***Note:*** *When you right-click a web page, the context-sensitive menu includes some commands for converting PDFs. Which commands are available depends on the element you right-click on the web page. For example, the commands that appear when you right-click a text link differ from those that appear when you right-click ordinary text on the web page.*

**1** Open the Adobe PDF pane in Internet Explorer, using one of the following methods:

- Choose Adobe PDF Explorer Bar from the Adobe PDF toolbar menu.
- Choose View > Explorer Bar > Adobe PDF.

**2** In the Adobe PDF pane, manage folders by doing any of the following:

- To add a new folder, select the location for the folder in the tree structure and click New Folder, or right-click the location icon and choose New Folder.
- To rename a folder, right-click the folder, choose Rename, and type a new name.
- To delete a folder, right-click the folder and choose Delete.

***Note:*** *Only PDF files appear in the navigation structure in the Adobe PDF pane, but other files may be present in folders. If you attempt to delete a folder that contains files that aren't visible, a confirmation message appears. If you're not sure that you want to delete those files, click No.*

**3** In the Adobe PDF pane, manage PDFs by right-clicking a PDF and choosing one of the following:

**Open In Internet Explorer** Opens the selected PDF within the document pane of Internet Explorer.

**Open In Acrobat** Opens the selected PDF in a standalone instance of Acrobat.

**Open Containing Folder** Opens the folder in which the PDF is located, as a new instance of Windows Explorer.

**Add Web Page To This File** Converts the currently open web page to PDF and adds it as a new page to the selected PDF.

**Add Selection To This File** Converts your selection within the currently open web page to PDF and adds it as a new page to the selected PDF.

***Note:*** *You can also rename or delete the selected PDF from the right-click menu.*

## Convert web pages to PDF in Acrobat

Although you can convert an open web page to PDF from Internet Explorer, you get additional options when you run the conversion from the Acrobat application. For example, you can include an entire website in the PDF or just some levels of a website. Also, you can select Web Page Conversion options that apply when you create PDFs from web pages.

### See also

"Asian language PDFs" on page 51

"Web Page Conversion options in Acrobat" on page 87

#### Convert a web page to PDF

**1** In Acrobat, choose File > Create PDF > From Web Page, or click the Create PDF From Web Page button on the toolbar to open the dialog box.

**2** In URL, enter the complete path to the web page, or click Browse and locate the HTML page that you want to convert.

**3** Under Settings, enter the number of levels you want to include, or select Get Entire Site to include all levels from the website.

***Note:*** *Some websites may have hundreds or even thousands of pages. This can take a long time to download, may make your system slow and unresponsive, and can even use up all available hard disk space and memory, causing a system crash. You may want to begin by downloading only one level of pages and then go through them to find particular links to download.*

**4** Select one or both of the following options:

**Stay On Same Path** Downloads only web pages subordinate to the specified URL.

**Stay On Same Server** Downloads only web pages stored on the same server.

**5** Click Settings, and review the selected options in the Web Page Conversion Settings dialog box. Make any changes you want on the General and Page Layout tabs, and click OK.

**6** Click Create.

***Note:*** *You can view PDF pages while they are downloading; however, you cannot modify a page until the download process is complete.*

*If you closed the Download Status dialog box, Choose Advanced > Web Capture > Bring Status Dialogs To Foreground to see the dialog box again.*

#### Add an unlinked web page to an existing PDF

Use this procedure to append pages to a writable PDF. If the original PDF is read-only, the result will be a new PDF rather than new pages in the existing PDF.

**1** Open the existing PDF in Acrobat (the PDF to which you want to append a web page).

**2** Choose Advanced > Web Capture > Create PDF From/Append Web Page.

**3** Enter the URL to the web page you want to append and select options, as described for converting web pages to PDF, and then click Create.

#### Add a linked web page to an existing PDF

**1** Open the previously converted PDF in Acrobat. If necessary, scroll to the page containing links to the pages you want to add.

**2** Do one of the following:

- Click a web link in your PDF.
- Right-click/Control-click the web link, and choose Append To Document.
- Choose Advanced > Web Capture > View Web Links. The dialog box lists all the links on the current page or on the tagged bookmark's pages. Using the Shift key or Ctrl key as needed, click to select the linked pages you want to add, or click Select All. Click Properties to set the download options, as needed, and then click Download.
- Choose Advanced > Web Capture > Append All Links On Page.

***Note:*** *After pages have been converted, links to these pages change to internal links, and clicking a link takes you to the PDF page, rather than to the original HTML page on the web.*

#### Convert a linked web page to a new PDF

**1** Open the previously converted PDF in Acrobat. If necessary, scroll to the page containing a web link you want to convert.

**2** Do one of the following:

- Right-click/Control-click the web link, and choose Open Weblink As New Document.
- Ctrl-click/Control-click the web link.

***Note:*** *In Windows, you can also convert a linked page from a web page displayed in Internet Explorer, using a similar right-click command.*

#### Copy the URL of a web link

Use this procedure to copy the path for a web link to the clipboard, to use it for other purposes.

**1** Open the previously converted PDF in Acrobat. If necessary, scroll to the page containing links to the pages you want to copy.

**2** Right-click/Control-click the web link and choose Copy Link Location.

## Change Acrobat web page conversion options

The settings for converting web pages to PDF apply to the conversion process. Any changes you make to these settings apply to PDFs you create from web pages after changing the settings. The settings changes do not affect existing PDFs.

#### Edit the web page conversion options

**1** Choose File > Create PDF > From Web Page.

**2** Click the Settings button.

**3** On the General tab, select new options under File Type Settings and PDF Settings, as needed. If you select a text file type, you can click the Settings button to see additional options for that file type.

**4** On the Page Layout tab, select options for page size, orientation, and scaling, as needed, and then click OK.

### Reset web page conversion options to default settings

1 Choose Edit > Preferences.

2 Under Categories, select Web Capture, and then click Reset Conversion Settings To Defaults.

## Web Page Conversion options in Acrobat

The Web Page Conversion Settings dialog box is available only from within Acrobat. The Settings button in the Create PDF From Web Page dialog box opens the Web Page Conversion Settings.

***Note:*** *The options available in the Web Page Conversion Settings are different from those available in the Web Capture Preferences. Together, these settings apply to both the web conversion and web capture processes.*

### General tab

**File Type Settings** Specifies the file type to be downloaded. If you select HTML or Plain Text as the file type, click Settings to select the font properties and other display characteristics.

**Create Bookmarks** Creates a tagged bookmark for each converted web page using the page's title (HTML Title element) as the bookmark name. If the page has no title, the URL is used as the bookmark name.

**Create PDF Tags** Stores a structure in the PDF that corresponds to the HTML structure of the web pages and lets you create tagged bookmarks for paragraphs, list elements, and other items that use HTML elements.

**Place Headers & Footers On New Pages** Places a header and footer on every page. Headers show the web page's title; footers show the page's URL, the page number in the downloaded set, and the date and time of the download.

**Save Refresh Commands** Saves a list of all URLs and remembers how they were downloaded in the PDF for refreshing (updating) purposes. Must be selected before you can update a PDF-converted website.

### Page Layout tab

The upper portion of this tab shows options similar to those on a Page Setup or Print dialog box, specifying a selection of page sizes and options for width, height, margin measurements, and page orientation. The right side of the tab area shows a Sample Page that adjusts when you change the measurements or orientation options.

The Scaling portion of the tab area shows these options:

**Scale Wide Contents To Fit Page (Windows)/Scale Contents To Fit Page (Mac OS)** Rescales a page's contents, if necessary, to fit the width of the page. If this option is not selected, the paper size adjusts to fit the page's contents if necessary.

**Switch To Landscape If Scaled Smaller Than** Changes the page orientation to landscape if the new version of a page is less than 70% of the original size. Available only if you selected portrait orientation.

### HTML Conversion Settings

This dialog box opens when you select HTML on the General tab of the Web Page Conversion Settings dialog box, and then click the Settings button.

**General tab** Lets you specify the following options:

• **Default Colors** Sets the default colors for text, page backgrounds, web links, and text that replace unavailable images. Click the color button to open a palette, and select the color. To use these colors on all pages, select Force These Settings For All Pages.

• **Background Options** Specifies whether to display colors and tiled images in page backgrounds and colors in table cells. If options are deselected, converted web pages may look different than they do in a web browser, but may be easier to read when printed.

• **Line Wrap** Wraps preformatted (HTML) lines of text. When selected, this option changes the line breaks so that the text fits on the PDF pages. Select this setting if an HTML file has unreasonably long lines of preformatted text.

• **Multimedia** Determines whether to reference multimedia (such as SWF files) by URL, disable multimedia capture, or embed multimedia files when possible.

• **Convert Images** Includes images in the conversion to PDF. If you do not select this option, an image is indicated by a colored border (and possibly text, if specified by the page's design).

• **Underline Links** Underlines textual web links on the pages.

**Fonts And Encoding tab** Lets you specify the following options:

• **Default** Under Input Encoding, sets the input encoding of a file's text from a menu of operating systems and alphabets.

• **Always** Ignores any encoding that is specified in the HTML source file and uses the selection shown in the Default option.

• **When Page Doesn't Specify Encoding** Uses the selection shown in the Default option only if the HTML source file does not specify a type of encoding.

• **Language Specific Font Settings** Use these settings to change the fonts used to display body text, headings, and preformatted text. Click Change, select new fonts from the menus, and click OK.

• **Font Size** Sets the font sizes used for body text, headings, and preformatted text.

• **Embed Platform Fonts When Possible** Stores the fonts used on the pages in the PDF so that the text always appears in the original fonts. Note that embedding fonts increases the size of the file.

### Plain Text Conversion Settings

**General tab** Lets you specify the following options:

• **Color swatches** Swatches indicate the colors selected for text and background. Colors can be changed by clicking the swatch and selecting a new color in the color picker that opens.

• **Wrap Lines At Margin** Inserts a soft return when the text reaches the edge of the text area on the page.

• **Reflow Text** (Available only when Wrap Lines At Margin is selected.) Makes text more accessible for users with special needs.

• **Limit Lines Per Page** Sets the maximum number of lines that can appear on a single page, based on the entry in Max Lines.

**Fonts And Encoding tab** Lets you specify the following options:

• **Default** Under Input Encoding, sets the input encoding of a file's text.

• **Language Specific Font Settings** Use these settings to change the fonts used to display body text, headings, and preformatted text. Click Change, select new fonts from the menus, and click OK.

• **Font Size** Sets the font sizes used for body text, headings, and preformatted text.

• **Embed Platform Fonts When Possible** Stores the fonts used on the pages in the PDF so that the text always appears in the original fonts. Note that embedding fonts increases the size of the file.

### Web Capture preferences in Acrobat

You can set several preferences for opening PDFs created from web pages and for customizing the process of converting web pages to PDFs. To open the Web Capture Preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS) and select Web Capture under Categories.

***Note:*** *The options available in the Web Capture Preferences are different from those available in the Web Page Conversion Settings. Together, these settings apply to both the web conversion and web capture processes.*

**Verify Stored Images** Specifies how often to check whether images on the website have changed.

**Show Bookmarks Panel When New PDF File (Created From Web Page) Is Opened** When selected, automatically opens the navigation pane and displays tagged bookmarks when you open a new file. (When deselected, the navigation pane is closed when you open converted web pages, but the tagged bookmarks are still created. Click the Bookmarks button to see the tagged bookmarks in the navigation pane.)

**Skip Downloading Secured Pages** Select Always to skip secured pages when downloading multiple levels of a website. If you select After, a password dialog box appears that times out and skips the secured pages after the specified number of seconds.

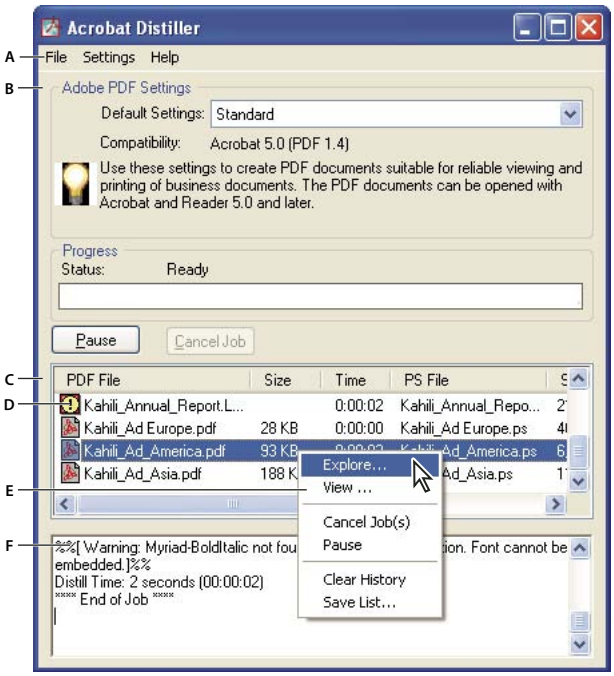
**Reset Conversion Settings To Defaults** Changes the options in the Web Page Conversion Settings dialog box back to the original settings.

***Note:*** *If you select this option, the settings revert immediately and irreversibly. If you want to restore your custom conversion options, you must enter each of those settings again.*

# Creating PDFs with Acrobat Distiller

### Acrobat Distiller overview

In Acrobat Distiller, you can select settings used to convert documents to PDFs, security options, and font information. You also use the Acrobat Distiller window to monitor the jobs you've lined up for PDF conversion.




*Acrobat Distiller main window (Windows)*
***A.** Menus **B.** Adobe PDF settings files **C.** Files in job queue **D.** Failed job **E.** Context menu **F.** Status window*

***Note:** In Mac OS, there is no context menu. Instead, a Clear List button clears all distilled jobs from the list.*

### Start Acrobat Distiller

❖ Do one of the following:

- In Acrobat, choose Advanced > Print Production > Acrobat Distiller.
- (Windows) Choose Start > Programs > Acrobat Distiller 8.0.
- (Mac OS) Use the Finder to locate Acrobat Distiller 8.0, and double-click it to open the Distiller application.

## Manage the conversion queue

Distiller lets you queue PostScript files that you create in authoring applications and then monitor them throughout the PDF conversion process.

### Queue a PostScript file

**1** In Distiller, select an Adobe PDF settings file from the Default Settings pop-up menu.

**2** (Optional) Choose Settings > Security and select an encryption level.

**3** Open the PostScript file and start the conversion process, using either method:

- Choose File > Open, select a PostScript file, and click Open.
- Drag one or more PostScript files from the desktop to the Acrobat Distiller window.

*Click Pause before doing step 3 if you want to review the queue before Distiller starts converting the files.*

### Change the queue during processing

Do any of the following:

- To temporarily stop processing the current job, click Pause. Or (Windows only), right-click the job queue and choose Pause.
- To resume processing the current job, click Resume. Or (Windows only), right-click the job queue and choose Resume.
- To delete files from the queue, click Cancel Job. Cancel Jobs deletes all files from the queue that are not yet successfully completed. Or (Windows only), select and right-click individual files in the job queue and choose Cancel Job(s) to delete only those files.
- (Windows only) To open the folder where the selected files are, right-click the job queue and choose Explore.
- (Windows only) To open the selected PDF in Acrobat, a browser, or Reader, right-click the job queue and choose View. Or, double-click the PDF to open it in Acrobat.

### Save a history of the job queue (Windows)

❖ Right-click the job queue, and choose Save List.

Distiller saves and opens the history as a PDF.

### Clear the queue

Remove all paused and successfully converted files from the list:

- (Windows) Right-click the job queue, and choose Clear History.
- (Mac OS) Click the Clear List button above the queue.

## Distiller preferences

The Distiller preferences control global Distiller settings. You set Distiller preferences by choosing File > Preferences (Windows) or Distiller > Preferences (Mac OS).

**(Windows) Notify When Windows TEMP Folder Is Nearly Full** Warns you if available hard disk space is less than 1 MB. Required hard disk space is often double the size of the PostScript file being processed.

**Ask For PDF File Destination** Lets you specify the name and location for files when using drag-and-drop or the Print command.

**Ask To Replace Existing PDF File** Warns you if you are about to overwrite an existing PDF.

**View PDF When Using Distiller** Automatically opens the converted PDF.

**Delete Log Files For Successful Jobs** Creates a log file (named *messages.log*) only if there are messages from interpreting the PostScript file or if a PostScript error occurs. (Log files for failed jobs are always created.)

## Guidelines for creating PostScript files

If you want to fine-tune the creation of the PDF with Distiller parameters or pdfmark operators, first create a PostScript file and then convert that file to PDF. For details, download the Adobe Acrobat 8 SDK or specific parts of it, such as the *pdfmark Reference Manual*, from various tabs on the Acrobat SDK documentation page (English only) on the Adobe website.

In authoring applications such as Adobe InDesign, use the Print command with the Adobe PDF printer to convert a file to PostScript. The Print dialog boxes can vary from application to application. For instructions on creating a PostScript file from your specific application, see the application's documentation.

Keep the following guidelines in mind when creating PostScript files:

- Use PostScript Language Level 3 whenever possible to take advantage of the most advanced features of PostScript.
- Use the Adobe PDF printer as your PostScript printer.
- (Windows) Send the fonts used in the document.
- Give a PostScript file the same name as the original document, but with the extension .ps. (Some applications use a .prn extension instead.)
- Use color and custom page sizes that are available with the Acrobat Distiller 8.0 PPD file. Other PPD files may cause inappropriate colors, fonts, or page sizes in the PDF.
- Send PostScript files as 8-bit binary data when using FTP to transfer the files between computers, especially if the platforms are different, to avoid converting line feeds to carriage returns or vice versa.

# Adobe PDF conversion settings

## Choose an Adobe PDF preset for converting files

**1** Do one of the following:

- Start Acrobat Distiller 8.0.
- In an Adobe Creative Suite application, choose File > Print, select Adobe PDF as the target printer, and click Properties.
- (Windows) In Office 2007 applications, choose Acrobat > Preferences.
- (Windows) In another authoring application or utility, choose Adobe PDF > Change Conversion Settings.

**2** Choose a preset from the Default Settings (or Conversion Settings) menu.

***Note:*** *All settings create PDFs that can be opened in Acrobat 5.0 and later, and Acrobat Reader 5.0 and later, unless otherwise described.*

## Adobe PDF presets

A PDF *preset* is a group of settings that affect the process of creating a PDF. These settings are designed to balance file size with quality, depending on how the PDF will be used. Most predefined presets are shared across Adobe Creative Suite applications, including InDesign, Illustrator, Photoshop, and Acrobat. You can also create and share custom presets for your unique output requirements.

A few of the presets listed below are not available until you move them—as needed—from the Extras folder (where they installed by default) to the Settings folder for custom settings.

Typically, the Extras and Settings folders for default settings are found in (Windows) Documents and Settings/All Users/Application Data/Adobe/Adobe PDF, (Vista) ProgramData/Adobe/Adobe PDF, or (Mac OS) Library/Application Support/Adobe PDF. The default settings files installed with Distiller are Read Only and Hidden.

The custom settings are found in (Windows) Documents and Settings/*[username]*/Application Data/Adobe/Adobe PDF/Settings, (Vista) Users/*[username]*/AppData/Roaming/Adobe/Adobe PDF/Settings, or (Mac OS) Users/*[username]*/Library/Application Support/Adobe/Adobe PDF/Settings.

Some presets are not available in some Creative Suite applications.

*Review your PDF settings periodically. The settings do not automatically revert to the default settings. Applications and utilities that create PDFs use the last set of PDF settings defined or selected.*

**High Quality Print** Creates PDFs for quality printing on desktop printers and proofing devices. This preset uses PDF 1.4, downsamples color and grayscale images to 300 ppi and monochrome images to 1200 ppi, embeds subsets of all fonts, leaves color unchanged, and does not flatten transparency (for file types capable of transparency). These PDFs can be opened in Acrobat 5.0 and Acrobat Reader 5.0 and later. In InDesign, this preset also creates tagged PDFs.

**Illustrator Default (Illustrator only)** Creates a PDF in which all Illustrator data is preserved. PDFs created with this preset can be reopened in Illustrator without any loss of data.

**Oversized Pages (Acrobat only)** Creates PDFs suitable for viewing and printing of engineering drawings larger than 200 x 200 inches (508 x 508 cm). These PDFs can be opened in Acrobat and Reader 7.0 and later.

**PDF/A-1b: 2005 (CMYK and RGB) (Acrobat only)** Used for long-term preservation (archival) of electronic documents. PDF/A-1b uses PDF 1.4 and converts all colors to either CMYK or RGB, depending on which standard you choose. These PDFs can be opened in Acrobat and Reader versions 5.0 and later.

**PDF/X-1a (2001 and 2003)** PDF/X-1a requires all fonts to be embedded, the appropriate PDF bounding boxes to be specified, and color to appear as CMYK, spot colors, or both. Compliant files must contain information describing the printing condition for which they are prepared. PDF files created with PDF/X-1a compliance can be opened in Acrobat 4.0 and Acrobat Reader 4.0 and later.

PDF/X-1a uses PDF 1.3, downsamples color and grayscale images to 300 ppi and monochrome images to 1200 ppi, embeds subsets of all fonts, creates untagged PDFs, and flattens transparency using the High Resolution setting.

***Note:*** *The PDF/X1-a:2003 and PDF/X-3 (2003) presets are placed on your computer during installation but aren't available until you move them from the Extras folder to the Settings folder.*

**PDF/X-4 (2007)** In Acrobat 8, this preset is called PDF/X-4 DRAFT to reflect the draft state of the ISO specification at Acrobat ship time. This preset is based on PDF 1.4, which includes support for live transparency. PDF/X-4 has the same color-management and International Color Consortium (ICC) color specifications as PDF/X-3. You can create PDF/X-4-compliant files directly with Creative Suite 3 applications (Illustrator, InDesign, and Photoshop). In Acrobat 8, use the Preflight feature to convert PDFs to PDF/X-4 DRAFT.

PDF files created with PDF/X-4 compliance can be opened in Acrobat 7.0 and Reader 7.0 and later.

**Press Quality** Creates PDF files for high-quality print production (for example, for digital printing or for separations to an imagesetter or platesetter), but does not create files that are PDF/X-compliant. In this case, the quality of the content is the highest consideration. The objective is to maintain all the information in a PDF file that a commercial printer or print service provider needs in order to print the document correctly. This set of options uses PDF 1.4, converts colors to CMYK, downsamples color and grayscale images to 300 ppi and monochrome images to 1200 ppi, embeds subsets of all fonts, and preserves transparency (for file types capable of transparency).

These PDF files can be opened in Acrobat 5.0 and Acrobat Reader 5.0 and later.

***Note:*** *Before creating an Adobe PDF file to send to a commercial printer or print service provider, find out what the output resolution and other settings should be, or ask for a .joboptions file with the recommended settings. You might need to customize the Adobe PDF settings for a particular provider and then provide a .joboptions file of your own.*

**Rich Content PDF** Creates accessible PDF files that include tags, hyperlinks, bookmarks, interactive elements, and layers. This set of options uses PDF 1.5 and embeds subsets of all fonts. It also optimizes files for byte serving. These PDF files can be opened in Acrobat 6.0 and Adobe Reader 6.0 and later. (The Rich Content PDF preset is in the Extras folder.)

***Note:*** *This preset was called eBook in earlier versions of some applications.*

**Smallest File Size** Creates PDF files for displaying on the web or an intranet, or for distribution through an email system. This set of options uses compression, downsampling, and a relatively low image resolution. It converts all colors to sRGB, and (for Adobe Acrobat Distiller-based conversions) does not embed fonts. It also optimizes files for byte serving.

These PDF files can be opened in Acrobat 5.0 and Acrobat Reader 5.0 and later.

**Standard (Acrobat only)** Creates PDF files to be printed to desktop printers or digital copiers, published on a CD, or sent to a client as a publishing proof. This set of options uses compression and downsampling to keep the file size down, but also embeds subsets of all (allowed) fonts used in the file, converts all colors to sRGB, and prints to a medium resolution. Note that Windows font subsets are not embedded by default. PDF files created with this settings file can be opened in Acrobat 5.0 and Acrobat Reader 5.0 and later.



*For more information about shared PDF settings for Adobe Creative Suite applications, see the PDF Integration Guide on the Creative Suite CD.*

## Customize Adobe PDF settings

You may want to create custom conversion settings for certain jobs or output devices. The selections you make determine such things as whether the document fonts are embedded and subsetted at 100%, how vector objects and images are compressed and/or sampled, and whether the resulting PDF includes high-end printing information such as OPI (Open Prepress Interface) comments. Default settings files cannot be modified, but can be duplicated to help create new settings files.

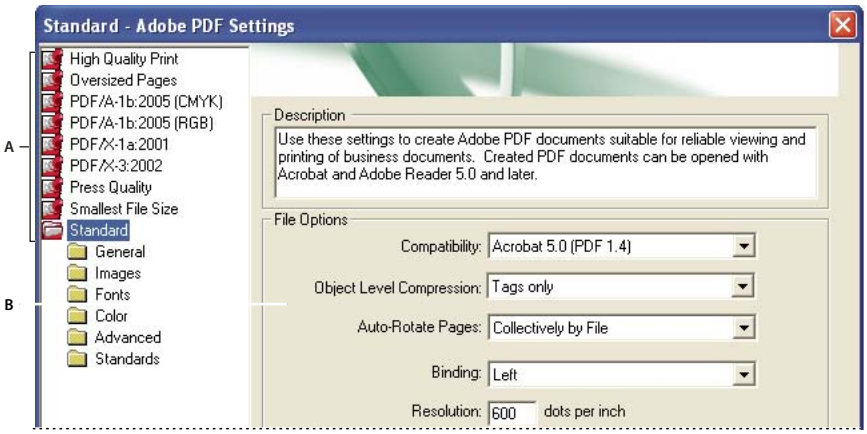
***Note:*** *If the PDF is intended for high-end printing, ask your service provider for their custom .joboptions file with the recommended output resolution and other settings. This way, the PDF you give them will have characteristics optimized for your print workflow.*

### Create a custom Adobe PDF settings file

**1** Do one of the following:

- In Acrobat Distiller, select one of the predefined sets of options from the Default Settings menu to use as a starting point, and then choose Settings > Edit Adobe PDF Settings.
- In authoring applications or utilities, select Adobe PDF as the target printer—typically in the Page Setup or Print dialog boxes—and click Properties.
- (Windows) In the Acrobat PDFMaker dialog box, click Advanced Settings in the Settings tab.

***Note:*** *In Windows, you can switch to a different preset from within the Adobe PDF Settings dialog box. To do this, select Show All Settings at the bottom left and then select a preset from the list on the left.*




*Adobe PDF Settings dialog box (Windows)*
***A.*** *Predefined Adobe PDF settings* ***B.*** *Options panel*

**2** Select panels one at a time, using the folder icons in the list (Windows) or the tab buttons across the top of the dialog box (Mac OS), and make the changes that you want to apply.

**3** Save your customized preset in one of the following ways:

- Click OK to save a duplicate of the custom preset file, which will automatically be renamed. For example, if you edit the Press Quality preset, your first customized version appears as Press Quality (1).
- Click Save As, type a new descriptive name for the file, and click Save.

The custom file is saved in (Windows) /Documents and Settings/*[user name]*/Application Data/Adobe/Adobe PDF/Settings, (Vista) User/*[user name]*/AppData/Roaming/Adobe/Adobe PDF/Settings, or (Mac OS) Users/*[user name]*/Library/Application Support/Adobe/PDF/Settings

#### Delete custom Adobe PDF settings files

**1** In Acrobat Distiller, choose Settings > Remove Adobe PDF Settings.

**2** Select a custom file that you want to delete, and click Remove.

**3** Repeat step 2 as needed, and then click Cancel to close the Remove Adobe PDF Settings dialog box.

## Adobe PDF settings

The Adobe PDF Settings dialog box in Acrobat Distiller contains panels of options that you can select to customize your PDF output.

### See also

"Find PostScript font names" on page 108

#### General panel options

Use this panel to select a version of Acrobat for file compatibility and other file and device settings. (The panel appearance differs in Windows and Mac OS.)

**Compatibility** Sets the compatibility level of the PDF. Use the most recent version (in this case, version 1.7) to include all the latest features and functionality. If you're creating PDFs that will be distributed widely, choose an earlier level, to ensure that all users can view and print the document.

**Object Level Compression** Compresses structural information (such as bookmarks, accessibility, and noncompressible objects), making this information neither visible or usable in Acrobat 5.0 or Reader 5.0. Tags Only compresses structural information; Off applies no compression.

**Auto-Rotate Pages** Automatically rotates pages according to the direction of text.

- **Collectively By File** Rotates all pages to match the orientation of the majority of text in the document.
- **Individually** Rotates each page based on the orientation of the text on that page.
- **Off** Prevents pages from rotating.

***Note:*** *If Process DSC Comments is selected in the Advanced panel and if %%Viewing Orientation comments are included, these comments take precedence in determining page orientation.*

**Binding** Specifies whether to display a PDF with left-side or right-side binding. The Binding setting affects the display of pages in the Two-Up Continuous view and the display of thumbnails side by side.

**Resolution** Use for PostScript files to emulate resolutions based on the printer they are printing to. Permitted values range from 72 to 4000. Use the default setting unless you plan to print the PDF on a specific printer while emulating the resolution defined in the original PostScript file.

***Note:*** *Increasing the resolution setting increases file size and may slightly increase the time required to process some files.*

**Pages** Specifies which pages to convert to PDF.

**Embed Thumbnails** Embeds a thumbnail preview for each page in the PDF, increasing the file size. Deselect this setting when users of Acrobat 5.0 and later will view and print the PDF; these versions generate thumbnails dynamically each time you click the Pages panel of a PDF.

**Optimize For Fast Web View** Restructures the file for faster access (page-at-a-time downloading, or byte serving) from web servers. This option compresses text and line art, overriding compression selections on the Images panel.

**Default Page Size** Specifies the page size to use when one is not specified in the original file. EPS files give a bounding box size, not a page size.

### Images panel options

The options in the Images panel specify compression and resampling for color, grayscale, and monochrome images. You may want to experiment with these options to find an appropriate balance between file size and image quality.

The resolution setting for color and grayscale images should be 1.5 to 2 times the line screen ruling at which the file will be printed. The resolution for monochrome images should be the same as the output device, but be aware that saving a monochrome image at a resolution higher than 1500 dpi increases the file size without noticeably improving image quality. Images that will be magnified, such as maps, may require higher resolutions.

***Note:*** *Resampling monochrome images can have unexpected viewing results, such as no image display. If this happens, turn off resampling and convert the file again. This problem is most likely to occur with subsampling, and least likely with bicubic downsampling.*

The following table shows common types of printers and their resolution measured in dpi, their default screen ruling measured in lines per inch (lpi), and a resampling resolution for images measured in pixels per inch (ppi). For example, if you were printing to a 600-dpi laser printer, you would enter 170 for the resolution at which to resample images.

| Printer resolution | Default line screen | Image resolution |
|---|---|---|
| 300 dpi (laser printer) | 60 lpi | 120 ppi |
| 600 dpi (laser printer) | 85 lpi | 170 ppi |
| 1200 dpi (image-setter) | 120 lpi | 240 ppi |
| 2400 dpi (image-setter) | 150 lpi | 300 ppi |

**Downsample (Off)** Reduces image resolutions that exceed the For Images Above value to the resolution of the output device by combining pixels in a sample area of the image to make one larger pixel.

**Average Downsampling To** Averages the pixels in a sample area and replaces the entire area with the average pixel color at the specified resolution.

**Subsampling To** Replaces an entire area with a pixel selected from that sample area, at the specified resolution. Causes faster conversion time than downsampling, but resulting images are less smooth and continuous.

**Bicubic Downsampling To** Uses a weighted average, instead of a simple average (as in downsampling) to determine pixel color. This method is slowest but produces the smoothest tonal gradations.

**Compression/Image Quality** Applies compression to color, grayscale, and monochrome images. For color and grayscale images, also sets the image quality.

**Anti-Alias To Gray** Smooths jagged edges in monochrome images. Choose 2 bit, 4 bit, or 8 bit to specify 4, 16, or 256 levels of gray. (Anti-aliasing may cause small type or thin lines to look blurry.)

***Note:*** *Compression of text and line art is always on. If you need to turn it off, you can do so by setting the appropriate Distiller parameter. For details, see the documentation available for download on the Acrobat SDK documentation page (English only) on the Adobe website.*

**Policy** Opens the Image Policy dialog box, where you can set processing options for Color, Grayscale, and Monochrome images that are less than the resolutions you specify. For each type of image, enter a resolution value, and then choose Ignore, Warn And Continue, or Cancel Job.

### Fonts panel options

The Fonts options specify which fonts to embed in a PDF, and whether to embed a subset of characters used in the PDF. You can embed OpenType®, TrueType, and Type 1 fonts. Fonts that have license restrictions are preceded by a lock icon . If you select a font that has a license restriction, the nature of the restriction is described in the explanation area of the Adobe PDF Options dialog box.

***Note:*** *When you combine PDF files that have the same font subset, Acrobat attempts to combine the font subsets.*

**Embed All Fonts** Embeds all fonts used in the file. Font embedding is required for PDF/X compliance.

**Embed OpenType Fonts** Embeds all OpenType fonts used in the file, and maintains OpenType font information for advanced line layout. This option is available only if either Acrobat 7 (PDF 1.6) or Acrobat 8 (PDF 1.7) is selected from the Compatibility menu in the General panel.

**Subset Embedded Fonts When Percent Of Characters Used Is Less Than** Specifies a threshold percentage if you want to embed only a subset of the fonts. For example, if the threshold is 35, and less than 35% of the characters are used, Distiller embeds only those characters.

**When Embedding Fails** Specifies how Distiller should respond if it cannot find a font to embed when processing a file.

**Always Embed** To embed only certain fonts, move them into the Always Embed list. Make sure that Embed All Fonts is not selected.

**Never Embed** Move fonts that you do not want to embed to this list. If necessary, choose a different font folder from the pop-up menu to display the font in the font list.

***Note:*** *Fonts that have license restrictions are preceded by a lock icon. If you select a font with a license restriction, the nature of the restriction is described in the explanation area of the Adobe PDF Options dialog box.*

**Add Name** If the font you want is not in a font folder, click Add Name, enter the name of the font, select Always Embed List (or Never Embed List), and click Add.

***Note:*** *A TrueType font can contain a setting added by the font's designer that prevents the font from being embedded in PDF files.*

**Remove** Removes a font from the Always Embed or Never Embed list. The font isn't removed from your system; the reference to it is removed from the list.

***Note:*** *Acrobat 8 does not include the Times, Helvetica, and ZapfDingbats fonts that have been included in Acrobat 5.0 and earlier. If you want these fonts to be viewed and printed in PDFs that you create, embed the fonts.*

### Color panel options

Whether you're using color management information in the PostScript file, using Distiller CSFs, or defining custom settings, you set all color management information for Distiller on the Color panel of the Adobe PDF Settings dialog box.

**Settings File** Lists color settings, including those used in graphics applications. The None setting lets you edit the Color Management Policies and Working Spaces settings.

**Color Management Policies** Specifies how Distiller converts unmanaged color in a PostScript file when you don't use a Distiller color settings file. This menu is available when None is selected in the Settings File menu.

***Note:*** *Color Management Policies values may affect a PDF differently depending on the compatibility setting you choose in the General panel.*

- **Leave Color Unchanged** Leaves device-dependent colors unchanged and preserves device-independent colors as the nearest possible equivalent. This is a useful option for print shops that have calibrated their devices, have used that information to specify color in the file, and are only outputting to those devices.

- **Tag (Or Convert) Everything For Color Management** Tags color objects with an ICC profile and calibrates colors, making them device-independent in PDFs compatible with Acrobat 4.0 (PDF 1.3) and later. Converts device-dependent color spaces in images (RGB, Grayscale, and CMYK) to device-independent color spaces (CalRGB, CalGray, and Cie L*a*b) in Acrobat 3.0 (PDF 1.2) compatible PDFs.

- **Tag (Or Convert) Only Images For Color Management** Tags ICC profiles in images only (not text or vector objects), which prevents black text from undergoing any color shift when distilling Acrobat 4.0 (PDF 1.3) compatible PDFs. Converts device-dependent color spaces in images (RGB, Grayscale, and CMYK) to device-independent color spaces (CalRGB, CalGray, and Lab) in Acrobat 3.0 (PDF 1.2) compatible PDFs.

- **Convert All Colors To sRGB (or Convert Everything To CalRGB)** Calibrates color, making it device-independent. Converts CMYK and RGB images to sRGB in PDFs compatible with Acrobat 4.0 (PDF 1.3) or later. Converts CMYK and RGB images to calibrated RGB (CalRGB) in Acrobat 3.0 (PDF 1.2) compatible PDFs. Recommended for PDFs that will be used on-screen or with low-resolution printers.

- **Convert All Colors To CMYK** Converts color spaces to DeviceGray or DeviceCMYK according to the options specified in the Working Spaces menu. All Working Spaces must be specified.

**Document Rendering Intent** Choose a method to map colors between color spaces. The result of any particular method depends on the profiles of the color spaces. For example, some profiles produce identical results with different methods.

Acrobat shares four rendering intents (Perceptual, Saturation, Relative Colorimetric, and Absolute Colorimetric) with other Creative Suite applications. For descriptions of these rendering intents, see "About rendering intents" on page 324.

Acrobat also includes a rendering intent called Preserve, which indicates that the intent is specified in the output device rather than in the PDF. In many output devices, Relative Colorimetric is the default intent.

***Note:*** *In all cases, intents may be ignored or overridden by color management operations that occur subsequent to the creation of the PDF file.*

**Working Spaces** For all Color Management Policies values other than Leave Color Unchanged, choose a working space to specify which ICC profiles are used for defining and calibrating the grayscale, RGB, and CMYK color spaces in distilled PDFs. For more information on working spaces, see "About color working spaces" on page 320.

- **Gray** Choose a profile to define the color space of all grayscale images in files. The default ICC profile for gray images is Adobe Gray - 20% Dot Gain. Choose None to prevent grayscale images from being converted.
- **RGB** Choose a profile to define the color space of all RGB images in files. The default, sRGB IEC61966-2.1, is recognized by many output devices. Choose None to prevent RGB images from being converted.
- **CMYK** Choose a profile to define the color space of all CMYK images in files. The default is U.S. Web Coated (SWOP) v2. Choose None to prevent CMYK images from being converted.

***Note:*** *Choosing None for all three working spaces has the same effect as selecting the option Leave Color Unchanged.*

*You can add ICC profiles (such as ones provided by your print service bureau) by placing them in the ICCProfiles folder in the Common folder, the Windows\System\Color folder (Windows), or the System Folder/ColorSync folder (Mac OS).*

**Preserve CMYK Values For Calibrated CMYK Color Spaces** When selected, device-independent CMYK values are treated as device-dependent (DeviceCMYK) values, device-independent color spaces are discarded, and PDF/X-1a files use the Convert All Colors To CMYK value. When deselected, device-independent color spaces convert to CMYK, provided that Color Management Policies is set to Convert All Colors To CMYK.

**Preserve Under Color Removal And Black Generation** Retains these settings if they exist in the PostScript file. Black generation calculates the amount of black to use when reproducing a color. Undercolor removal (UCR) reduces cyan, magenta, and yellow to compensate for black generation. Because UCR uses less ink, it's suitable for uncoated stock.

**When Transfer Functions Are Found** Specifies how to handle transfer functions in PDFs. Transfer functions are used for artistic effect and to correct for the characteristics of a specific output device.

- **Remove** Deletes any applied transfer functions. Applied transfer functions should be removed, unless the PDF is to be output to the same device that the source PostScript file was created for.
- **Preserve** Retains the transfer functions traditionally used to compensate for dot gain or dot loss that may occur when an image is transferred to film. Dot gain or loss occurs when the ink dots that make up a printed image are larger or smaller than in the halftone screen.
- **Apply** Applies the transfer function, changing the colors in the file but doesn't keep it. This method is useful for creating color effects in a file.

**Preserve Halftone Information** Retains any halftone information in files. Halftone information is intended for use with a particular output device.

### Advanced panel options

The Advanced options specify which Document Structuring Conventions (DSC) comments to keep in a PDF and how to set other options that affect the conversion from PostScript. In a PostScript file, DSC comments contain information about the file (such as the originating application, the creation date, and the page orientation) and provide structure for page descriptions in the file (such as beginning and ending statements for a prologue section). DSC comments can be useful when your document is going to print or press.

When you work with the Advanced options, it is helpful to have an understanding of the PostScript language and how it is translated to PDF. See *PostScript Language Reference, Third Edition* (Addison-Wesley) and *PDF Reference Fifth Edition: Adobe Portable Document Format Version 1.6* on the PDF reference page (English only) on the Adobe website. The same website has more detailed descriptions of the Advanced options and their parameters.

***Note:*** *The ASCII Format option has been removed from Distiller, but is still available as a Distiller parameter.*

**Allow PostScript File To Override Adobe PDF Settings** Uses settings stored in a PostScript file rather than the current PDF settings file. For details, see the documentation available for download on the Acrobat SDK documentation page (English only) of the Adobe website.

**Allow PostScript XObjects** PostScript XObjects store fragments of PostScript code to be used when a PDF is printed on a PostScript printer. Use only in controlled workflows where there is no other option. Available when the Standard or Smallest File Size is selected from the Default Settings menu.

**Convert Gradients To Smooth Shades** Converts blends to smooth shades for Acrobat 4.0 and later, improving quality and reducing file size of PDFs. Distiller converts gradients from Adobe Illustrator, Adobe InDesign, Adobe FreeHand, CorelDraw, QuarkXPress, and Microsoft PowerPoint.

**Convert Smooth Lines To Curves** Reduces the amount of control points used to build curves in CAD drawings, which results in smaller PDFs and faster on-screen rendering.

**Preserve Level 2 Copypage Semantics** Uses the copypage operator defined in PostScript Level 2 rather than in Language Level 3 PostScript. If you have a PostScript file and select this option, a copypage operator copies the page. If this option is not selected, the equivalent of a showpage operation is executed, except that the graphics state is not reinitialized.

**Preserve Overprint Settings** Retains any overprint settings in files being converted to PDF. Overprint settings create color by printing one ink on top of another ink.

**Overprinting Default Is Nonzero Overprinting** Prevents overprinted objects with zero CMYK values from knocking out CMYK objects beneath them.

**Save Adobe PDF Settings Inside PDF File** Embeds the settings file (.joboptions) used to create the PDF as an attachment. (To view the settings file, choose View > Navigation Panels > Attachments in Acrobat.)

**Save Original JPEG Image In PDF If Possible** Processes compressed JPEG images (images that are already compressed using DCT encoding) without recompressing them. When deselected, performance improves because only decompression, not recompression, occurs.

**Save Portable Job Ticket Inside PDF File** Preserves a PostScript job ticket in a PDF. Job tickets describe the PostScript file and can be used later in a workflow or for printing the PDF.

**Use Prologue.ps and Epilogue.ps** Sends a prologue and epilogue file with each job. These files can be used to add custom PostScript code that you want to have executed at the beginning or end of every PostScript job being converted.

Sample Prologue.ps and Epilogue.ps files are located in (Windows) /Documents and Settings/All Users/Application Data/Adobe/Adobe PDF/Distiller/Data, (Vista) /Users/All Users/Adobe/Adobe PDF/Distiller/Data, or (Mac OS)/Library/Application Support/Adobe/Adobe PDF/Distiller/Data.

In Windows Explorer, the Application Data folder is typically hidden; to make it visible, choose Tools > Folder Options, click the View tab, and select Show Hidden Files And Folders. Or, you can type the path into the Address text box.

***Note:*** *Distiller processes prologue and epilogue files only if both files are present and located properly. The two files must be used together.*

**Process DSC Comments** Maintains DSC information from a PostScript file.

- **Log DSC Warnings** Displays warning messages about problematic DSC comments during processing and adds them to a log file.

- **Preserve EPS Information From DSC** Retains information for an EPS file, such as the originating application and creation date.

- **Preserve OPI Comments** Retains information needed to replace a For Placement Only (FPO) image or comment with the high-resolution image located on servers that support Open Prepress Interface (OPI) versions 1.3 and 2.0. For more information, see the OPI 2.0 specification (English only) on the Adobe website.

- **Preserve Document Information From DSC** Retains document properties, such as the title, creation date, and time, in the PDF.

- **Resize Page And Center Artwork For EPS Files** Centers an EPS image and resizes the page to fit closely around the image. If deselected, the page is sized and centered based on the upper left corner of the upper left object and lower right corner of the lower right object on the page. This option applies only to jobs that consist of a single EPS file.

### Standards panel options

By using Standards options, you can check document content in the PostScript file to make sure it meets standard PDF/X1-a, PDF/X-3, or PDF/A criteria before creating the PDF. For PDF/X-compliant files, you can also require that the PostScript file meet additional criteria by selecting options in the Standards panel. The availability of options depends on the standard you select. You can also create a PDF/X file from a compliant PDF by using the Preflight feature in Acrobat.

**PDF/X-compliant** Complies with the PDF/X standard for high-resolution print production.

***Note:*** *PDFMaker, the conversion method used to convert Microsoft Word and other application files to PDF, does not create PDF/X-compliant files.*

**PDF/A-compliant** Complies with the PDF/A standard for archival documents.

**Compliance Standard** Produces a report that indicates whether the file complies with the standard you select, and if not, what problems were encountered. The .log file appears at the bottom of the dialog box.

***Note:*** *PDFs that complied with both PDF/X-1a and PDF/X-3 standards in Acrobat 6.0 will default to PDF/X-1a in Acrobat 8.*

**When Not Compliant** Specifies whether to create the PDF if the PostScript file does not comply with the standard's requirements.

- **Continue** Creates a PDF even if the PostScript file doesn't meet the PDF/X requirements and notes these problems in the report.

- **Cancel Job** Creates a PDF only if the PostScript file meets the PDF/X requirements of the selected report options, and is otherwise valid.

**Report As Error** Flags the PostScript file as noncompliant if one of the reporting options is selected and a trim box or art box is missing from any page.

**Set TrimBox To MediaBox With Offsets (Points)** Computes values for the trim box based on the offsets for the media box of respective pages if neither the trim box nor art box is specified. The trim box is always as small as or smaller than the enclosing media box.

**Set BleedBox To MediaBox** Uses the media box values for the bleed box if the bleed box is not specified.

**Set BleedBox To TrimBox With Offsets (Points)** Computes values for the bleed box based on the offsets for the trim box of respective pages if the bleed box is not specified. The bleed box is always as large as or larger than the enclosed trim box. This option uses the units specified on the General panel of the Adobe PDF Settings dialog box.

**Output Intent Profile Name** Indicates the characterized printing condition for which the document has been prepared, and is required for PDF/X compliance. If a document doesn't specify an output intent profile name, Distiller uses the selected value from this menu. If your workflow requires that the document specify the output intent, choose None.

**Output Condition Identifier** Indicates the reference name that is specified by the registry of the output intent profile name. For more information, click the question mark next to the option.

**Output Condition** Describes the intended printing condition. This entry can be useful for the intended receiver of the PDF. For more information, click the question mark next to the option.

**Registry Name (URL)** Indicates the web address for finding more information about the output intent profile. The URL is automatically entered for ICC registry names. The registry name is optional, but recommended. For more information, click the question mark next to the option.

**Trapped** Indicates the state of trapping in the document. PDF/X compliance requires a value of True or False. If the document does not specify the trapped state, the value provided here is used. If your workflow requires that the document specify the trapped state, choose Leave Undefined.

## PDF compatibility levels

When you create PDFs, you need to decide which PDF version to use. You can change the PDF version by switching to a different preset or choosing a compatibility option when you save as PDF or edit a PDF preset.

Generally speaking, unless there's a specific need for backward compatibility, you should use the most recent version (in this case, version 1.7). The latest version will include all the newest features and functionality. However, if you're creating documents that will be distributed widely, consider choosing Acrobat 5 (PDF 1.4) or Acrobat 6 (PDF 1.5) to ensure that all users can view and print the document.

The following table compares some of the functionality in PDFs created using the different compatibility settings.

| Acrobat 4.0 (PDF 1.3) | Acrobat 5.0 (PDF 1.4) | Acrobat 6.0 (PDF 1.5) | Acrobat 7.0 (PDF 1.6) and Acrobat 8 (PDF 1.7) |
|---|---|---|---|
| PDFs can be opened with Acrobat 3.0 and Acrobat Reader 3.0 and later. | PDFs can be opened with Acrobat 3.0 and Acrobat Reader 3.0 and later. However, features specific to later versions may be lost or not viewable. | Most PDFs can be opened with Acrobat 4.0 and Acrobat Reader 4.0 and later. However, features specific to later versions may be lost or not viewable. | Most PDFs can be opened with Acrobat 4.0 and Acrobat Reader 4.0 and later. However, features specific to later versions may be lost or not viewable. |
| Cannot contain artwork that uses live transparency effects. Any transparency must be flattened prior to converting to PDF 1.3. | Supports the use of live transparency in artwork. (The Acrobat Distiller feature flattens transparency.) | Supports the use of live transparency in artwork. (The Acrobat Distiller feature flattens transparency.) | Supports the use of live transparency in artwork. (The Acrobat Distiller feature flattens transparency.) |
| Layers are not supported. | Layers are not supported. | Preserves layers when creating PDFs from applications that support the generation of layered PDF documents, such as Illustrator CS and later or InDesign CS and later. | Preserves layers when creating PDFs from applications that support the generation of layered PDF documents, such as Illustrator CS and later or InDesign CS and later. |
| DeviceN color space with 8 colorants is supported. | DeviceN color space with 8 colorants is supported. | DeviceN color space with up to 31 colorants is supported. | DeviceN color space with up to 31 colorants is supported. |
| Multibyte fonts can be embedded. (Distiller converts the fonts when embedding.) | Multibyte fonts can be embedded. | Multibyte fonts can be embedded. | Multibyte fonts can be embedded. |
| 40-bit RC4 security supported. | 128-bit RC4 security supported. | 128-bit RC4 security supported. | 128-bit RC4 and 128-bit AES (Advanced Encryption Standard) security supported. |

## Share custom PDF settings

You can save and reuse your own Adobe PDF preset definitions. You can also share a custom preset by sending a copy of the resulting file to other users, who can then add it to the Distiller applications installed on their own computers.

***Note:*** *PDF settings files have the extension .joboptions. Custom preset files are stored in (Windows) Documents and Settings/[username]/Application Data/Adobe/Adobe PDF/Settings or (Mac OS) User/[username]/Library/Application Support/Adobe/Adobe PDF/Settings.*

❖ To add a custom PDF settings file to the menu, do one of the following:

- Drag the .joboptions file onto the Distiller window.
- In Acrobat Distiller, choose Settings > Add Adobe PDF Settings, browse to the copied .joboptions file, select it, and click Open.

The settings file appears as the selected option in the Default Settings menu.

## Compressing and downsampling images

When converting PostScript files to PDF, you can compress vector objects (such as text and line art) and compress and downsample images. Line art is described with a mathematical equation and is usually created with a drawing program such as Adobe Illustrator. Images—whether color, monochrome, or grayscale—are described as pixels and are created with applications like Adobe Photoshop or by scanning. Monochrome images include most black-and-white illustrations made by paint programs and any images scanned with an image depth of 1 bit.

When you downsample (or decrease the number of pixels), information is deleted from the image. With Distiller, you specify an *interpolation* method—average downsampling, bicubic downsampling, or subsampling—to determine how pixels are deleted. Depending on the settings you choose, compression and downsampling can significantly reduce the size of a PDF with little or no loss of detail and precision.

When Distiller processes a file, it normally applies the compression settings to images throughout the file. However, you can assign different compression and downsampling methods to individual images.

### Varying the compression and downsampling methods within a PDF

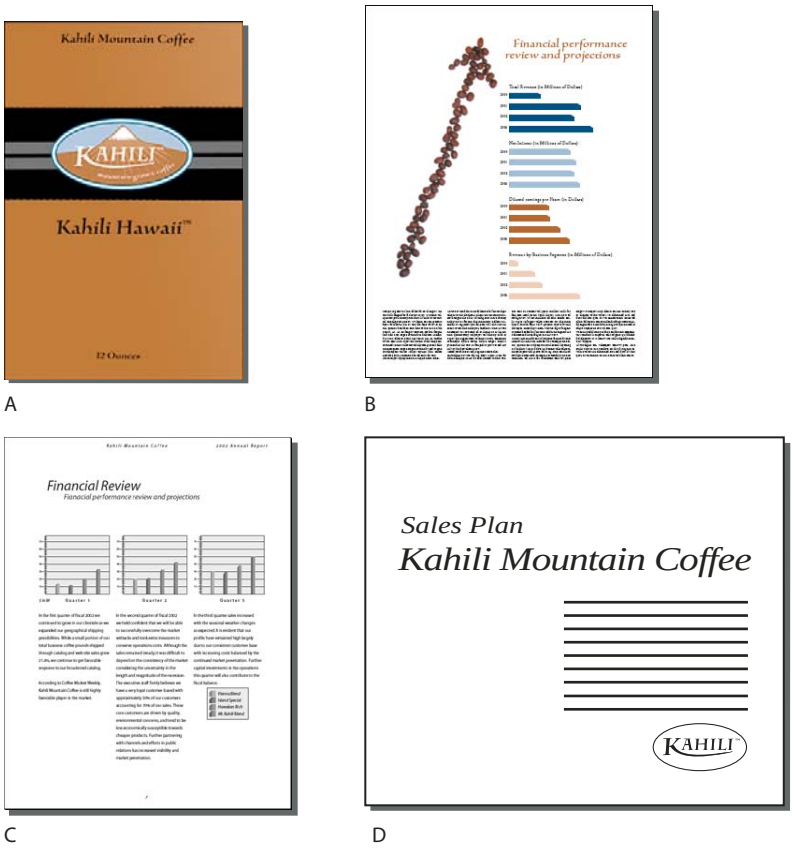
Before you create a PDF, you can take various approaches to applying different compression and downsampling options to the individual images that will go into that PDF:

- Use Adobe Photoshop to resample and compress existing image files before using Distiller. When you are ready to create the PDF in Distiller, be careful to deselect the compression and downsampling or subsampling options.
- Create separate PostScript files for each part of the document that you want to process differently, and use different compression options to distill each part. Then use Distiller to merge the files into a single PDF.
- When you create color, grayscale, and monochrome images in an art application (such as Adobe Photoshop), select the compression and downsampling settings that you want when you save each image from within that application.
- Insert Distiller parameters before images in a PostScript file. You can use this technique to process every image in a document differently. This technique is the most difficult, because it requires knowledge of PostScript programming. For more information on using parameters, see the documentation available for download on the Acrobat SDK documentation page (English only) of the Adobe website.

***Note:*** *To apply the inserted Distiller parameters, select Allow PostScript File To Override Adobe PDF Settings on the Advanced panel of the Adobe PDF Settings dialog box in Distiller. This option overrides settings you selected in the Adobe PDF dialog box.*

## Compression methods

Distiller applies ZIP compression to text and line art, ZIP or JPEG compression to color and grayscale images, and ZIP, CCITT Group 3 or 4, or Run Length compression to monochrome images.




A B C D

*Suitable compression methods for different art types*
***A.** ZIP **B.** JPEG **C.** CCITT **D.** Run Length*

You can choose from the following compression methods:

**ZIP** Works well on images with large areas of single colors or repeating patterns, and for black-and-white images that contain repeating patterns. Acrobat supports only 8-bit ZIP compression, which is *lossless*; that is, data is not removed to reduce file size, so image quality is not affected.

***Note:** Adobe implementation of the ZIP filter is derived from the zlib package of Jean-loup Gailly and Mark Adler, whose generous assistance we gratefully acknowledge.*

**JPEG** Suitable for grayscale or color images, such as continuous-tone photographs. JPEG is *lossy*, which means that it removes image data and may reduce image quality; however, it attempts to reduce file size with the minimum loss of information. Because JPEG compression eliminates data, it can achieve much smaller file sizes than ZIP compression.

**CCITT** Available only for monochrome bitmap images. CCITT (Consultative Committee on International Telegraphy and Telephony) compression is appropriate for black-and-white images and any images scanned with an image depth of 1 bit. Group 4 is a general-purpose method that produces good compression for most monochrome images. Group 3, used by most fax machines, compresses monochrome images one row at a time.

**Run Length** Produces the best results for images that contain large areas of solid white or black.

# Fonts

## Font embedding and substitution

A font can be embedded only if it contains a setting by the font vendor that permits it to be embedded. Embedding prevents font substitution when readers view or print the file, and ensures that readers see the text in its original font. Embedding increases file size only slightly, unless the document uses CID fonts, a font format commonly used for Asian languages. You can embed or substitute fonts in Acrobat or when you export an InDesign document to PDF.

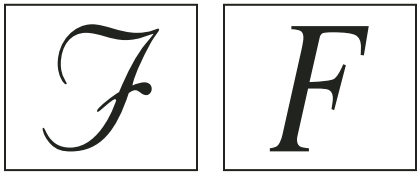
You can embed the entire font, or just a subset of the characters used in the file. Subsetting ensures that your fonts and font metrics are used at print time by creating a custom font name. That way, for example, your version of Adobe Garamond®, not your service provider's version, can always be used by the service provider for viewing and printing. Type 1 and TrueType fonts can be embedded if they are included in the PostScript file, or are available in one of the font locations that Distiller monitors and are not restricted from embedding.

***Note:*** *(Acrobat) In some cases, TrueType fonts that have gone through a PostScript driver can no longer be searched, copied, cut, or pasted. To minimize this problem, use Acrobat on the same system on which the PostScript file was created, and make sure that the TrueType fonts used in the file are available on the system.*

When a font cannot be embedded due to the font vendor's settings, and someone who opens or prints a PDF does not have access to the original font, a Multiple Master typeface is temporarily substituted: AdobeSerifMM for a missing serif font, and AdobeSansMM for a missing sans serif font.

The Multiple Master typeface can stretch or condense to fit, to ensure that line and page breaks in the original document are maintained. The substitution cannot always match the shape of the original characters, however, especially if the characters are unconventional ones, such as script typefaces.

***Note:*** *(Acrobat) For Asian text, Acrobat uses fonts from the installed Asian language kit or from similar fonts on the user's system. Fonts from some languages or with unknown encodings cannot be substituted; in these cases, the text appears as bullets in the file.*



*If characters are unconventional (left), the substitution font will not match (right).*

## Accessing and embedding fonts using Distiller

When converting a PostScript file to PDF, Distiller needs access to the file's fonts to insert the appropriate information in the PDF. Distiller first searches the PostScript file for Type 1, TrueType, and OpenType fonts. If the font isn't embedded in the PostScript file, Distiller searches additional font folders. Distiller searches the following font folders in Windows:

- /Resource/Font in the Acrobat folder
- /Windows/Fonts

Distiller searches the following font folders in Mac OS:

- /Resource/Font in the Acrobat folder
- /Users/[user name]/Library/Fonts

- /Library/Fonts
- /System/Library/Fonts

The Acrobat installation includes width-only versions of many common Chinese, Japanese, and Korean fonts, therefore Distiller can then access these fonts in Acrobat. Make sure that the fonts are available on your computer. (In Windows, choose Complete when you install Acrobat, or choose Custom and select the Asian Language Support option. In Mac OS, these fonts are installed automatically.)

For information on including fonts in a PostScript file, see the documentation that came with the application and printer driver you use to create PostScript files.

***Note:*** *Distiller does not support Type 32 fonts.*

## Preview PDFs without local fonts

You can create a printable preview of your document that substitutes default fonts for any text formatted in fonts that are available on your local machine but are not embedded in the PDF. This can help you decide whether or not to embed those local fonts in the PDF, to achieve the look you want for your document.

**1** In Acrobat, choose Edit > Preferences (Windows) or Acrobat 8 > Preferences (Mac OS.

**2** Under Categories, select Page Display, and then deselect Use Local Fonts.

***Note:*** *If a font cannot be substituted, the text appears as bullets, and Acrobat displays an error message.*

## Add more folders to Distiller font searches

In addition to the default font folders, Distiller can also search other font folders that you specify.

**1** Start Acrobat Distiller by doing one of the following:

- In Acrobat, choose Advanced > Print Production > Acrobat Distiller.
- Click or double-click an Acrobat Distiller icon or shortcut on the desktop, Start menu (Windows), or Dock (Mac OS).

**2** Choose Settings > Font Locations. The dialog box displays a list of the folders that Distiller searches for fonts. These folders can be on your hard drive or on a network.

Distiller indicates that a font folder is available by displaying a folder icon to the left of the folder name. If no icon appears, or if an icon with an x through it appears with a folder name, the connection to the folder has probably been lost. You'll need to reestablish the connection.

**3** To add a font folder, click Add, select the folder to add, and click OK (Windows) or Select Folder (Mac OS).

***Note:*** *To provide Distiller with access to a font folder that has been moved, use this dialog box to remove the folder listed in its old location and add it in its new location.*

**4** To remove a font folder, select the folder, and click Remove.

**5** Select Ignore TrueType Versions Of Standard PostScript Fonts to exclude TrueType fonts that have the same name as a font in the PostScript 3 font collection.

**6** Click OK.

## Find PostScript font names

If you need to enter a font name manually on the Fonts panel of the Adobe PDF Settings dialog box, you can use a PDF to find the exact spelling of the name.

**1** Use any application to create a one-page document with the font.

**2** Create a PDF from the document.

**3** Open the PDF in Acrobat, and choose File > Properties > Fonts.

**4** Write down the name of the font, using the exact spelling, capitalization, and hyphenation of the name as it appears in the Font Info dialog box.

# Chapter 4: Combining PDF content

Creating complex Adobe PDFs that include different types of files—files created in a variety of formats, even if they have different page sizes and page orientations—is actually quite easy in Acrobat 8.

It's also easier than you might imagine to make changes in a complex PDF so that it contains just the information you want to include, and does so in an orderly, unified, and efficient document that serves your needs.

## Quickstart

The following topics provide brief overviews of common tasks for combining PDFs and adding unifying elements.

### Create a PDF from multiple files

You can easily merge files of different types into a single PDF.

1. Click Combine Files, and then click Add Files.
2. Select the files you want to combine, and click Add Files.
3. Adjust the order of files as desired, and then choose a file size and conversion setting.
4. Click Next, select Merge Files Into A Single PDF, and click Create.

Rather than merging files, you can also create a PDF package of files.

#### See also

"Create merged PDFs and PDF packages" on page 114

### Assemble PDFs in a package

A *PDF package* lets you assemble related information into a single PDF while maintaining individual PDFs within it.

1. Click Combine Files, and then click Add Files.
2. Select the files you want to combine, and click Add Files.
3. Adjust the order of files as desired, and then choose a file size and conversion setting.
4. Click Next, select Assemble Files Into A PDF Package, and click Create.

#### See also

"Create merged PDFs and PDF packages" on page 114

### Modify a list of files to combine

When combining files, you have several options for adjusting the set of files.

1. Click Combine Files, click Add Files, and add the desired files.

**2** To modify the list of files or remove a file from the list, select a file, and then do any of the following:

- Click Move Up or Move Down or drag the file to a new location.
- Click Choose Pages to include a subset of pages. (Button name might change based on file type.)
- Click Remove or press Delete.

### See also

"Create merged PDFs and PDF packages" on page 114

## Add headers and footers

You can add a single header and footer throughout a PDF or apply different headers and footers selectively to various pages.

**1** Choose Document > Header & Footer > Add. If a message appears, click Add New.

**2** Specify font and margin settings.

**3** In the header and footer text boxes, type the desired text. Click the buttons below the boxes to insert a page number or date.

You can save header and footer settings for easy reuse.

### See also

"Add and edit headers and footers" on page 118

## Add a watermark

A watermark is text or an image that appears either behind or on top of content in a PDF.

**1** Choose Document > Watermark > Add.

**2** Do one of the following:

- Type the desired text and set the font attributes.
- Click File and browse to select the desired file.

**3** Specify rotation, opacity, scale, location, and position.

You can save watermark settings for reuse. For example, save a "Draft" watermark to add to all review PDFs.

### See also

"Add and edit watermarks" on page 123

## Add a background

A background is an image or color that's placed behind content in a PDF.

**1** Choose Document > Background > Add/Replace.

**2** Do one of the following:

- Click From Color, click the color swatch, and choose a background color.
- Click File and browse to select the desired image file.

**3** Set the rotation, opacity, scale, and position.

You can save background settings for reuse. For example, save an organizational emblem to add to official correspondence.

### See also

"Add and edit backgrounds" on page 121

## Rotate pages

You can rotate all or selected pages in a PDF.

**1** Choose Document > Rotate Pages.

**2** Specify the direction of the rotation and the page range.

**3** Choose the desired options from the Rotate menus.

To temporarily rotate a page, choose View > Rotate View > Clockwise or Counterclockwise.

### See also

"Rotate a page" on page 126

## Delete pages

After combining files, you can delete unwanted or blank pages.

**1** (Optional) Click the Pages button in the navigation pane and select the pages you want to delete.

**2** Choose Document > Delete Pages.

**3** Click Selected to delete selected pages or click From and specify a range.

If you want to retain a copy of the original PDF, make sure that you save the new document using Save As rather than Save.

### See also

"Delete or replace a page" on page 128

## Replace pages

To quickly update a PDF, you can replace individual pages.

**1** Choose Document > Replace Pages.

**2** Select the document that contains the replacement pages, and click Select.

**3** Under Original, specify the pages you want to replace. Under Replacement, specify the beginning replacement page.

Interactive elements, such as links and bookmarks, associated with the original pages aren't deleted.

### See also

"Delete or replace a page" on page 128

### Renumber pages

When you renumber pages, only the numbers that appear in the Pages panel and the toolbar are affected. To change the numbers that appear on the document pages, add a header or footer.

1 Click the Pages button, and choose Number Pages from the Options menu.

2 Specify which pages the numbering will be applied to.

3 Specify the numbering style, prefix (if any), and starting number.

You can also continue the numbering style of the previous section.

#### See also

"Renumber pages" on page 130

# Combining files into PDFs

### Combining different types of files

You already know that you can convert many types of files into Adobe PDFs. But you can also group files as you convert them, so that the end result keeps those files together. For example, you could combine all the documents for a specific project—such as the text documents, email messages, spreadsheets, CAD drawings, PowerPoint presentations, and so forth—into a PDF or PDF package. When you use the Combine Files wizard, you can even limit the conversion to specific pages (or spreadsheets, or slides) within individual source documents.

There are three types of PDFs that involve multiple files:

**Merged PDFs** You can convert multiple files of various types to produce a *merged PDF:* one in which converted documents flow into the PDF as sequential pages.

**PDF packages** You can use the Combine Files wizard to convert multiple files of various types into a *PDF package*: a set PDF components in which each file appears separately and has its own pagination. Component files also retain their individual security settings, forms features, and default views, and digital signatures stay intact. On Windows, you can archive Outlook or Lotus Notes email messages and message folders as PDF packages, using PDFMaker within the email application.

**PDFs embedded in other files** You can insert PDFs into files in other formats that support Object Linking and Embedding (OLE), such as Adobe InDesign or Word documents.

#### See also

"Convert email messages to PDFs (Windows)" on page 74

### About PDF packages

A PDF package converts multiple files—which can be in different formats and created in different applications—and assembles them into an integrated PDF unit. The original files retain their individual identities, but are still part of the one PDF package file. Each component file can be opened, read, edited, and formatted independently of the other component files in the PDF package.

You can create PDF packages when you use the Combine Files wizard, starting either from the Getting Started window, the Tasks toolbar, or the File > Combine Files command. In Windows, the Acrobat PDFMaker in Outlook and Lotus Notes can create PDF packages when you convert email messages to PDF or migrate PDF email archives created in earlier versions of Acrobat.

Depending on the circumstances, PDF packages offer several advantages over merging multiple files into an ordinary PDF:

**Adding and deleting** You can add or remove component documents easily, without having to find and select all the pages that originated in that file.

**Viewing** The component files do not open in separate windows, so you can quickly flip through them and make changes without having to pause for the Open or Save dialog boxes.

**Editing** You can make changes to individual PDFs within the PDF package without affecting the other component PDFs. For example, you can change the page numbering within that PDF, digitally sign, select different security settings, and so forth, without those changes applying to the other component documents. You can also rename components.

**Distribution** Because the PDF package is one file, you can share it with others and be sure that they are getting all the component parts.

**Sorting** The component PDFs in a PDF packages are listed under an assortment of categories that you can add to, delete, hide, and customize. Then, you simply click the category name to sort the list.

**Printing** The Print command on the File menu includes commands for printing the currently open document, all the documents in the PDF package, or multiple component documents selected in the PDF package list.

**Searching** The Advanced Search window includes options for searching the currently open document, all the documents in the PDF package, or multiple component documents selected in the PDF package list.

**Incorporating other formats** You can add non-PDF files to an existing PDF package without converting them to PDF. This can be done by a simple drag-and-drop process from the desktop, Microsoft Explorer, or the Mac OS Finder to the list of components in the open PDF package. Of course, non-PDF files do not enjoy all of the benefits of PDFs in the package.

**Independence from source files** The source files of a PDF packages—even existing PDFs you add to the package—are not changed when you create a PDF. Changes you make to the PDFs within the PDF package do not change the original files from which you created the PDF. You can move a PDF package anywhere on your computer or network without any risk of losing or disconnecting its components.

**Reuse** You can include or convert the same original source file into multiple PDF packages.

There are two limitations to PDF packages. They cannot be reviewed using one of the formal wizards or sent out in a data-collection workflow.

***Note:*** *PDF packages are completely different from Collections that you create in the Acrobat Organizer. Organizer Collections are simply tools that help you find related PDFs, regardless of where they are stored in the folder structure on your computer. PDF packages are actual PDF files, each of which is stored in a single location on your computer. Also, PDFs attached to other PDFs do not offer the same benefits as PDF packages.*

### See also

"View, sort, and search components in a PDF package" on page 26

"Convert email messages to PDFs (Windows)" on page 74

"Print documents in a PDF package" on page 331

## Create merged PDFs and PDF packages

The choices you make in the Combine Files wizard determine whether the files are merged into a single PDF or combined into a PDF package.

**1** Choose File > Combine Files, or click Combine Files on the Tasks toolbar.

If a PDF is currently open, it appears on the list of included files.

**2** In the Combine Files wizard, do any or all of the following:

- To add individual files, click Add Files, navigate as needed, select the files, and click Add Files. Repeat as needed to add files in other locations.
- To select all the files in a specific location, click Add Folders, navigate to the needed folder, select it, and click OK. Repeat as needed.
- To select files that you have combined into PDFs in other sessions, click Reuse Files. Select a previously created PDF on the left list, and then, in the right list, select the component documents that you want to include. (If you have not used the Combine Files wizard before, this button is not available.)
- To add other currently open PDFs, click Add Open Files, and select those PDFs.
- (Windows) To add files or folders from Windows Explorer, drag them into the Combine Files wizard or right-click the selected items and choose Combine Supported Files In Acrobat.

If any files are password-protected, one or more messages appear, in which you must enter the correct password.

*You can add a file more than once. For example, one file could be used for transition pages between other files or a blank file could be used to add blank pages.*

**3** Using the list of files, do any of the following:

- To rearrange the order of files on the list, select a file and drag it up or down the list. Or, select a file and click Move Up or Move Down.
- To remove a file from the list, select the filename and click Remove.
- To convert only part of a multipage source file, double-click the file, or select the file and click the Choose Pages button (see Note). In the Preview, review and select pages, as needed, following the instructions in the dialog box, which vary according to file type, and click OK. (Do not attempt to edit the document itself in the Preview.)

***Note:*** *The name of the Choose button varies according to file type. For PDFs and Word documents, it is labeled Choose Pages. For PowerPoint files, it is Choose Slides; for Excel files, Choose Sheets.*

**4** Select an appropriate file size and conversion options (as described in the following topic).

**5** Click Next, and then do one of the following:

- To combine the files as sequential pages of a PDF, select Merge Files Into A Single PDF.
- To combine the files into a PDF package, select Assemble Files Into A PDF Package. Then select a cover-sheet option: Use Adobe Template or Use First Document.

***Note:*** *If any of the selected files involve digital signatures, security settings, or XML forms, warnings will appear if you select Merge Files Into A Single PDF. In this case, combining the files into a PDF package is recommended. Also, a warning may appear if the first file listed is itself a PDF package because its cover sheet will be modified.*

**6** Use the Move Up, Move Down, and Remove buttons to make any final adjustments to the file sequence, if necessary, and then click Create.

A status dialog box shows the progress of the file conversions. Some source applications may start and close automatically.

**7** When the conversion is complete, review the preview thumbnails. If you want to make changes, click the Back button in the wizard, make the changes, and proceed forward again.

**8** Click Save, and select a name and location for the merged PDF or PDF package.

The default name of a new package is Package *[n]*.

### See also

"Convert email messages to PDFs (Windows)" on page 74

"Adobe PDF conversion settings" on page 92

#### Conversion settings

Conversion settings affect all files that will be converted to PDF from other file formats. The three options available in the Combine Files wizard apply three different conversion presets.

You can customize the default conversion preferences (choose Edit > Preferences, select Convert To PDF under Categories, and then specify the settings you want to use).

**Smaller File Size** Reduces large images to screen resolution and compresses, using low-quality JPEG. Suitable for on-screen display, email, and the Internet.

***Note:*** *If any of the source files are already PDFs, the Smaller File Size option applies the Reduce File Size feature to those files. This is not done if either the Default File Size or Larger File Size option is selected.*

**Default File Size** Creates PDFs suitable for reliable viewing and printing of business documents.

**Larger File Size** Applies the High Quality Print conversion preset.

**Options button** Opens the Options For Conversion Settings dialog box, which contains the following options:

- **Always Enable Accessibility And Reflow** Improves the readability for users with disabilities and on small-screen devices.

- **Always Add Bookmarks To Adobe PDF** Converts existing bookmarks in different native file formats to Adobe PDF bookmarks.

***Note:*** *An individual PDF created by merging multiple files into a single PDF has structured bookmarks that you can use to print or delete individual documents from the PDF. You can also use the bookmarks to extract the original component files as independent PDFs.*

## Add custom cover sheets to PDF packages

Each PDF package includes a cover sheet, which appears each time you open the file. Typically, the cover sheet provides instructions or information that is helpful to users reading the package. The default cover sheet is the Adobe template, which briefly discusses viewing PDF packages.

The cover sheet does not appear in the list of component PDFs. However, you can go back to the cover sheet by clicking the Cover Sheet button in the PDF package navigation bar.

**1** Using the authoring application of your choice, create the cover sheet.

**2** In Acrobat, choose File > Combine Files, and proceed as usual to select files, folders, and pages, and to choose a conversion option, and click Next. Be sure to include your custom cover sheet as one of the files, and then click Next.

**3** Select Assemble Files Into A PDF Package.

**4** Select the custom cover sheet source file, and drag it or click the Move Up button until it appears at the top of the list.

**5** Under Select Cover Sheet, choose Use First Document, and then click Create.

**6** When the conversion is complete, click Save and specify and location and name for the PDF package file.

## Extract component files in a PDF package

**1** In the list of component files, select the files that you want to extract.

**2** Do one of the following:

- Adjust the Acrobat window so that it does not completely fill the screen, and then drag the file onto the desktop, Windows Explorer, or the Finder.
- On the PDF package navigation bar, choose Options > Save File As, and select a location and name for the extracted file.
- Right-click/Control-click and choose Options > Save File As, and select a location and name for the extracted file.

### See also

"View, sort, and search components in a PDF package" on page 26

## Edit a PDF package

Editing a PDF package involves changes at the package level. For example, you can add or remove component files or set up new categories to facilitate sorting the components.

Editing the component PDFs within a package involves the same techniques used to make changes to any PDF, which are presented elsewhere in Help.

### See also

"Editing text and objects" on page 267

"Adding unifying page elements" on page 118

#### Add unconverted files to a PDF package

**1** On the PDF package navigation bar, choose Options > Add File, and select a location and name for the extracted file. Or, right-click/Control-click and choose Add File.

**2** Open the PDF package, and adjust the Acrobat window so that it does not completely fill the screen.

**3** On the desktop or in Windows Explorer or the Finder, select the file or files you want to add to the PDF package, and drag them into the list of component files in the Acrobat work area.

#### Add PDFs to a PDF package

❖ Do any of the following:

- In Windows Explorer or the Finder, select the PDFs you want to add to the currently open PDF package and drag them into the list of component files.
- In the PDF package navigation bar, choose Options > Add File or right-click/Control-click and choose Add File. Then locate and select the files you want to add.

#### Remove component files from a PDF package

❖ In the list of component files for the open PDF package, select the files that you want to remove and press Delete, or choose Options > Delete File.

#### Customize categories for the PDF list

**1** Do one of the following:

- On the PDF package navigation bar, choose Options > Package Properties
- Right-click/Control-click the categories pane in the PDF package navigation pane, and choose Package Properties.

**2** Click Add, and type a name for the new category in the Add Field dialog box.

**3** Make any other changes you want in the Package Properties dialog box:

- To change the order in which the categories appear, select individual categories and click Up or Down until you have them in the order you want.
- To hide a category, deselect its check box, or select the category and click Hide.
- To show a category, select its check box, or select the category and click Show.
- To remove a category, select the category and click Delete.
- To change the default category for sorting the PDFs, choose another category name in the Sort By menu.
- To set the sorting order, select Ascending or Descending.
- To specify the default locations of the PDF list, select Top, Left, or Minimized in the Initial View menu.
- To open the currently displayed PDF each time you reopen the PDF package, select Show Current Document When Opening Collection.

***Note:*** *Changes made to the Package Properties affect the entire PDF package and can be viewed by other users who open the PDF package.*

#### Edit category entries for the currently open component PDF

**1** In the list of component files, select the file that you want to edit.

**2** Do one of the following:

- On the PDF package navigation bar, choose Options > Edit Value > *[category name]*.
- Right-click/Control-click the categories bar or the selected component file, and choose Edit Value > *[category name]*.

**3** In the Edit *[category name]* dialog box, type the text to appear under this category for the currently selected component file.

## Insert one PDF into another

**1** Open the PDF that you want to serve as the basis of the combined file, and choose Document > Insert Pages.

**2** Select a PDF that you want to insert into the target document, and click Select.

**3** In the Insert Pages dialog box, specify where you want to insert the document (before or after the first, last, or a designated page of the open PDF), and click OK.

**4** To leave the original PDF intact as a separate file, choose Save As, and type a new name for the merged PDF.

*You can also add an existing PDF with a currently open PDF by dragging the desktop icon for the PDF you want to add directly into position in the Pages panel of the open PDF.*

### Placing PDFs as linked files in other documents

You can incorporate PDFs into other types of files that support Object Linking and Embedding (OLE), such as InDesign or Word files. These files are called OLE *container documents*. Later, if you make changes to the original PDF, the OLE features in the container application can update the embedded file in the container document, reflecting your changes to the original PDF.

❖ Do one of the following:

- Choose the OLE container application's Insert Object command or Insert Hyperlink command.
- In Acrobat, choose Edit > Copy File To Clipboard, and then choose the Paste Special command in the container application.

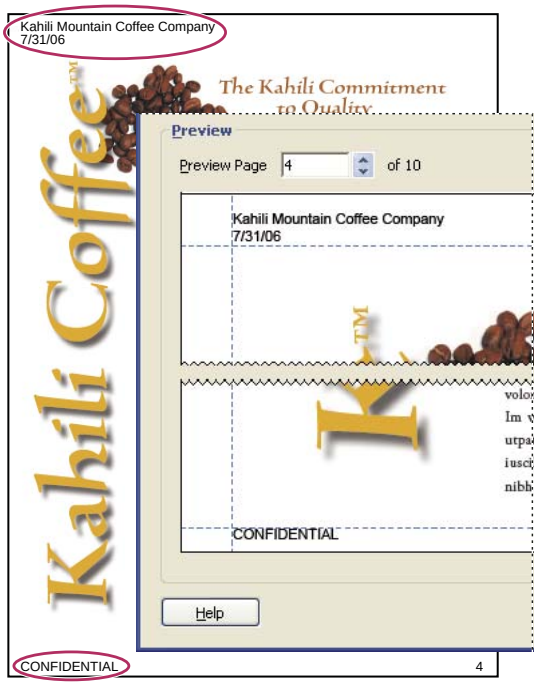
# Adding unifying page elements

### Add and edit headers and footers

A header and footer present consistent information in the page margins throughout a PDF. For example, the information could be a date, automatic page numbering, the title of the overall document, or author's name.

You can vary the headers and footers within a PDF. For example, you can add a header that displays the page number on the right side of odd-numbered pages, and another header that displays the page number on the left side of even-numbered pages. Each of these headers must be added individually.

You can define and save your headers and footers to reuse them later, or you can simply apply a header and footer and forget it. After applying a header and footer, you can edit, replace, or delete it in the PDF. You can also preview headers and footers before applying them and adjust the header and footer margins so that they don't overlap other page content.




*A header appears at the top of the page. A footer appears at the bottom of a page.*

### Define and apply headers and footers

You can add one or more sets of headers and footers to a PDF and apply them either globally or selectively to its pages. Each set of headers and footers must be applied in a separate session in the Add Header And Footer dialog box. Headers and footers can include automatically generated information and formatting, such as page numbering and the current date.

If you use the same types of headers and footers frequently, you can save header and footer definitions so that you can quickly apply them to other PDFs.

**1** Choose Document > Header & Footer > Add. If a message appears, click Add New.

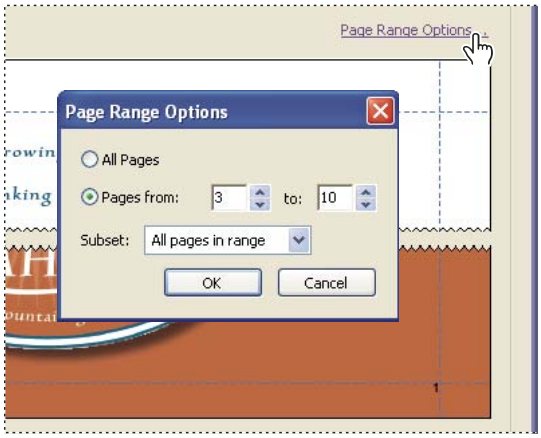
**2** Select your preferences for the font, type size, text color, and text underlining of the header and footer.

***Note:*** *The text properties apply to all header and footer entries that are part of this setting definition. You cannot apply different settings to individual header or footer text boxes within the same session in the Add Header And Footer dialog box.*

**3** Using the three header text boxes and three footer text boxes, type the text that you want to appear in any of these locations, and then do any of the following:

- To add the date of creation, click inside one of the header or footer text boxes, and click the Insert Date button.
- To add automatic page numbering, click inside one of the header or footer text boxes, and click the Insert Page Number button.
- To select formatting for automatic entries, click the Page Number And Date Format button, and choose the Date Format, Page Number Format, and Start Page Numbers At settings that you want to use.

***Note:*** *You can combine text with dates and page numbers. You can also add several lines of text to an entry. Text typed in the Left, Center, and Right boxes appears left-aligned, centered, and right-aligned, respectively.*




*Limiting header and footer to a range of pages*

**4** If you want to limit the pages on which the header and footer appear, click the Page Range Options button, and do the following:

- To limit the header and footer to a specific range of pages, select Pages From, and enter the beginning and ending page numbers.
- To limit the header and footer to one side or the other of a document with facing pages, choose an option on the Subset menu: Even Pages Only or Odd Pages Only. Otherwise, leave the default setting: All Pages In Range.

**5** As needed, change the values in the Top, Bottom, Left, and Right options to adjust the margins within the header and footer, using the Preview area to evaluate the results.

*To prevent any overlapping, you can click the Appearance Options button and select Shrink Document To Avoid Overwriting The Document's Text And Graphics. To prevent resizing or repositioning when printing the PDF in large format, select Keep Position And Size Of Header/Footer Text Constant When Printing On Different Page Sizes.*

**6** Examine the results in the Preview area, using the Preview Page option to see different pages of the PDF.

**7** (Optional) At the top of the dialog box, click Save Settings, type a descriptive name for the header and footer settings, and click OK. Then click OK again to apply the header and footer to the PDF.

If you want to add additional headers or footers, simply repeat this procedure.

### Update the headers and footers

Updating applies to the most recently added header and footer set.

**1** Choose Document > Header & Footer > Update.

**2** Make the changes you want.

### Add another header and footer

**1** Choose Document > Header & Footer > Add, and then click Add New in the message that appears.

The preview shows any existing headers and footers.

**2** Type text in the header and footer text boxes to add more headers and footers, noticing that the preview updates the appearance of the complete headers and footers on the page.

**3** Select new formatting options, as preferred, again noticing the updating in the preview.

### Replace all headers and footers

1 Choose Document > Header & Footer > Add, and then click Replace Existing in the message that appears.

2 Type text in the header and footer text boxes.

3 Select formatting options, as needed.

***Note:*** *This process applies only to headers and footers added in either Acrobat 7 or Acrobat 8.*

### Remove all headers and footers

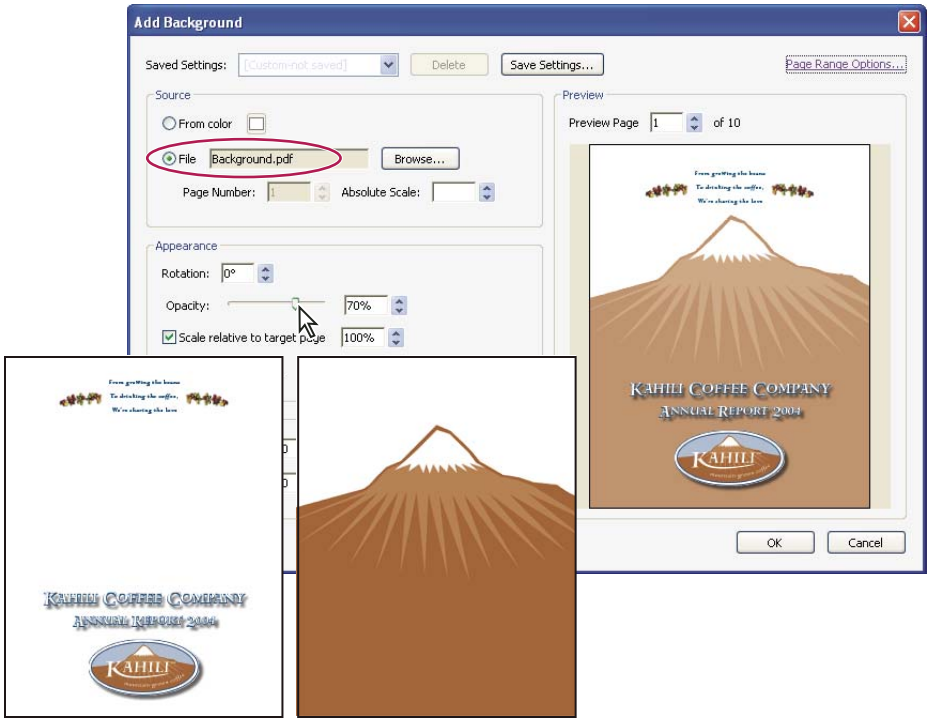
❖ Do one of the following:

- To remove all headers and footers, choose Document > Header & Footer > Remove, and then click Yes in the confirmation message that appears.
- To remove one header and footer immediately after adding it, choose Edit > Undo Headers/Footers.

***Note:*** *This process applies only to headers and footers added in either Acrobat 7 or Acrobat 8.*

## Add and edit backgrounds

A *background* appears behind text or images on the page. The background can be as simple as a solid color or you can use an image. You can selectively apply a background to only specific pages or page ranges in a PDF. A PDF supports only one background per page, but the backgrounds can vary from page to page.




*Before and after adding a background*

### Add, replace, or edit a background

1 Choose Document > Background > Add/Replace.

***Note:*** *If a message appears, telling you that the current document already has a background, click Replace Background. If you apply the new background to a limited range of pages, the old background will remain unchanged on pages outside of that range.*

**2** (Optional) To apply the background selectively to individual pages, click Page Range Options, select Pages From, and enter beginning and ending page numbers; then choose a Subset option for applying the background only to odd pages, even pages, or both.

**3** For Source, specify what you want to serve as the background:

- To reuse a background and background options that you saved in an earlier session, select it in the Saved Settings menu.
- To apply a solid color background, select From Color. Then click the color swatch to open the color picker, and select a color swatch or custom color.
- To use an image, select File. Then click Browse, locate the image file you want to use, and select it.

***Note:*** *Only PDF, JPEG, and BMP files can be used as background images.*

**4** Adjust the appearance and position of the background, as needed:

- To select a specific image in a multipage file, enter it in Page Number.
- To show an image file at a specific percentage of its full-size display, enter a value in Absolute Scale.
- To rotate a background image or colored area, enter a value in Rotation.
- To give the background image or color some transparency, drag the Opacity slider to the left or enter a percentage value.
- To resize a background image as a percentage of the PDF page size, select Scale Relative To Target Page.
- To show or hide the background when printing or viewing on screen, click Appearance Options and select the items you want to apply.
- To shift the position of the background image or colored area, enter values for the Vertical Distance from the Top, Center, or Bottom of the page and the Horizontal Distance from the Left, Center, or Right of the page.

**5** If a message appears after you click OK, telling you that backgrounds have already been defined for some pages in the page range, click OK.

#### Update a recently edited background image

If the original image file that you are using as a background changes, you can update the PDF to show the new version of the image rather than removing the old version and re-adding the new one.

**1** Choose Document > Background > Update.

**2** Click OK, or make other changes to the background options and then click OK.

***Note:*** *This process applies only to backgrounds added in either Acrobat 7 or Acrobat 8.*

#### Remove a background from PDF pages

❖ Do one of the following:

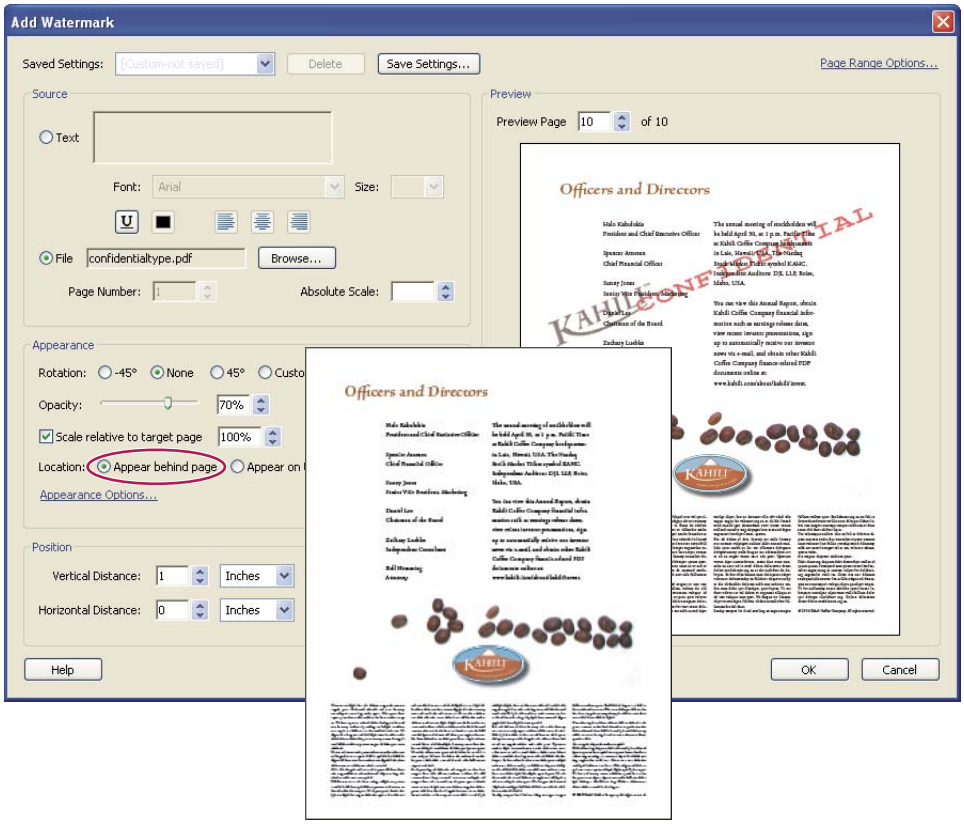
- To remove the background from only some pages in the PDF, choose Document > Background > Add/Replace. Then click Page Range Options, and enter page numbers and Subset options to restrict the background to the designated pages.
- To remove the background from all pages, choose Document > Background > Remove, and click OK to confirm the removal.

- To remove a background from all pages immediately after adding it, choose Edit > Undo Add Background.

## Add and edit watermarks

A *watermark* is text or an image that appears either above or behind existing document content, similar to a stamp. For example, you might want to apply a "Confidential" watermark to pages with sensitive information. You can add multiple watermarks to a PDF, and you can specify the page or range of pages on which each watermark appears.

***Note:*** *Unlike a stamp, a watermark is integrated into PDF pages as a fixed element. A stamp is a type of PDF comment, which others reading the PDF may open to display a text annotation, move, change, or delete.*




*Before and after adding a watermark*

### Add or replace a watermark

You can add multiple watermarks to a PDF, but each one must be added separately.

**1** Choose Document > Watermark > Add. If the PDF already contains one or more watermarks, a message appears; select Add New if you want to create an additional watermark, or select Replace Existing if you want to replace all existing watermarks with a new one.

**2** (Optional) To apply the watermark selectively to individual pages, click Page Range Options, select Pages From, and enter beginning and ending page numbers; then choose a Subset option for applying the watermark only to odd pages, even pages, or both.

**3** Specify the Source option:

- To create a text watermark, select Text, type the text you want to appear as the watermark in the text box, and then adjust the font, font size, font color, underlining, and paragraph-alignment options, as needed.

- To use an image as a watermark, select File. Then click Browse, locate the image file you want to use, select it, and click Open. If the file has multiple pages with images, click the Page Number up and down arrows to select the page you want.

***Note:*** *Only PDF, JPEG, and BMP images can be used as watermarks.*

**4** To change the size of an image watermark, do one of the following:

- To resize the watermark in relation to the actual size of the original image file, enter a percentage in the Absolute Scale option (in the Source area of the dialog box).
- To resize the watermark in relation to the PDF page dimensions, enter a percentage in the Scale Relative To Target Page (in the Appearance area of the dialog box).

**5** Adjust the appearance of the text or image watermark, as needed:

- To rotate the watermark, select an angle of rotation or enter a custom value.
- To give the watermark some transparency, drag the Opacity slider or enter a percentage.
- To stack the watermark relative to the page content, select Appear Behind Page (page content overprints the watermark) or Appear On Top Of Page (watermark overprints the page content).
- To specify when the watermark appears, click Appearance Options and select or deselect Show When Printing and Show When Displaying On Screen.
- To control variations in a PDF with pages of varying sizes, click Appearance Options and select or deselect Keep Position And Size Of Watermark Text Constant When Printing On Different Page Sizes.

**6** Specify the position in which you want the watermark to appear by entering the vertical and horizontal distances between the watermark and the left, right, center, top, or bottom of the page.

#### Update a watermark

**1** Choose Document > Watermark > Update.

**2** Make changes to the watermark, and then click OK.

***Important:*** *If you have multiple watermarks in a PDF, this procedure will update only the first watermark you added and will discard all other watermarks. If you change your mind about updating the watermarks after you have completed this process, immediately choose Edit > Undo Watermark.*

#### Remove watermarks

❖ Do one of the following:

- To remove all watermarks from all pages, choose Document > Watermark > Remove, and click OK to confirm the removal.
- To remove a watermark from all pages immediately after adding it, choose Edit > Undo Watermark.

## Crop pages

The Crop Pages dialog box is where you can adjust the visible page area. This can help you create consistency within a PDF composed of pages of different sizes.

Cropping does not reduce file size because information is merely hidden, not discarded.

*When you prepare a PDF for printing, you can change the Art, Trim, and Bleed areas for a PDF page in the Crop dialog box. If you want to see indicators of these areas in the document pane, select the Display Art, Trim, Bleed Boxes option in the Page Display Preferences. (Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Page Display under Categories.)*

### Crop empty areas around page content

**1** Choose Document > Crop Pages.

**2** Under Margin Controls, select Remove White Margins.

### Crop one or more pages

**1** Choose Document > Crop Pages.

**2** In the pop-up menu in the upper left corner, leave CropBox selected, and then adjust values for the Margin Controls: Top, Bottom, Left, and Right.

A black rectangle in the thumbnail page display shows the adjusted boundaries of the cropped page.

**3** (Optional) One by one, select ArtBox, TrimBox, and BleedBox in the pop-up menu, and adjust the Margin Control values each time. The adjusted boundaries appear as rectangles in the thumbnail page display: red, green, and blue, respectively.

**4** Select other options under Change Page Size, as appropriate for your PDF.

**5** Under Page Range, in the lower right area of the dialog box, do any of the following:

- To crop all pages in the PDF, select All.
- To crop only one page or a range of pages, select From, and enter page numbers in the From and To options.
- To crop only every other page, choose either Odd Pages Only or Even Pages Only from the Apply To menu. Otherwise, leave Even And Odd Pages selected.

***Note:*** *If you select a range of pages to be cropped, the odd- or even-pages setting applies only within that range. Otherwise, it applies to all pages in the document.*

Because the Crop property is selected by default, the margin values that you specify determine the final Crop boundary. The dialog box displays each selected property as a differently colored box in the preview area. Select Show All Boxes to preview all properties at once. Select each property that you want to adjust.

### Crop a page with the Crop tool

**1** Choose Tools > Advanced Editing > Crop Tool.

**2** Drag a rectangle on the page you want to crop. If necessary, drag the corner handles of the cropping rectangle until the page is the size you want.

**3** Double-click inside the cropping rectangle.

The Crop Pages dialog box opens, indicating the margin measurements of the cropping rectangle and the page to be cropped. You can override these settings or apply other options by making new selections in the dialog box before clicking OK.

### Crop Pages dialog box settings

**Show All Boxes** Shows the black, red, green, and blue rectangles indicating the CropBox, ArtBox, TrimBox, and BleedBox on the page thumbnails. When two (or more) margins coincide, only a colored line appears.

**CropBox** Defines the boundary for the contents of a page when it's displayed or printed. If not otherwise specified (for example, in the JDF settings), the crop boundary determines how page contents are positioned on the output medium.

**ArtBox** Defines the meaningful content of the page, including white space.

**TrimBox** Defines the finished dimensions of the page after trimming.

**BleedBox** Defines the clipping path when the page is printed professionally to allow for paper trimming and folding. Printing marks may fall outside the bleed area.

**Remove White Margins** Crops the page to the artwork boundary. This option is useful for trimming the edges of presentation slides saved as PDFs.

**Set To Zero** Restores the crop margins to zero.

**Revert To Selection** Reverts to the crop margin selected with the Crop tool.

#### Undo cropping

Cropping a PDF does not reduce file size because information is merely hidden, not discarded. By resetting the page size, you can restore the page and its content to its original condition.

**1** Open the Crop Pages dialog box by choosing one of the following:

- Document > Crop Pages.
- Crop Pages from the Options menu on the Pages panel.

**2** Reset the margins to the original dimensions.

# Rearranging pages in a PDF

## Rotate a page

You can rotate all or selected pages in a document. Rotation is based on 90˚ increments.

**1** Open the Rotate Pages dialog box using one of the following methods:

- Choose Document > Rotate Pages.
- From the Options menu on the Pages panel, choose Rotate Pages.

**2** For Direction, select the amount and direction of the rotations: Counterclockwise 90 Degrees, Clockwise 90 Degrees, or 180 Degrees.

**3** For Pages, specify whether all pages, a selection of pages, or a range of pages are to be rotated.

**4** From the Rotate menu, specify even pages, odd pages, or both, and select the orientation of pages to be rotated.



*To temporarily change your view of the page, choose View > Rotate View > Clockwise or Counterclockwise. The original page orientation is restored the next time you open the PDF.*

## Extract pages in a PDF

*Extraction* is the process of reusing selected pages of one PDF in a different PDF. Extracted pages contain not only the content but also all form fields, comments, and links associated with the original page content.

You can leave the extracted pages in the original document or remove them during the extraction process—comparable to the familiar processes of cutting-and-pasting or copying-and-pasting, but on the page level.

***Note:*** *Any bookmarks or article threading associated with pages are not extracted.*

**1** Open the PDF in Acrobat and choose Document > Extract Pages.

**2** Specify the range of pages to extract.

**3** In the Extract Pages dialog box, do one or more of the following before you click OK:

- To remove the extracted pages from the original document, select Delete Pages After Extracting.
- To create a single-page PDF for each extracted page, select Extract Pages As Separate Files.
- To leave the original pages in the document and create a single PDF that includes all of the extracted pages, leave both check boxes deselected.

**4** If a message appears asking you to confirm the deletion, click Yes to delete the extracted pages from the original PDF, or click No to go back to the Extract Pages dialog box.

The extracted pages are placed in a new document named Pages From *[original document name]-[n]*.

***Note:*** *The creator of a PDF document can set the security to prevent the extraction of pages. To view the security settings for a document, choose File > Properties, and select Security.*

### See also

"Extract component files in a PDF package" on page 116

## Move or copy a page

You can use page thumbnails to copy or move pages within a document and between documents.

When you drag a page thumbnail in a Pages panel, a bar appears near other thumbnails, indicating the position in which it will appear in the PDF. This bar appears at the bottom or top when the thumbnails are in a single column, or to the left or right if more than one column of thumbnails is displayed.

***Note:*** *Tagged bookmarks affect the order that reading devices follow, such as devices for the visually impaired. Tagged bookmarks do not change the sequence of pages in a PDF.*

### See also

"Insert one PDF into another" on page 117

"About tags, accessibility, reading order, and reflow" on page 233

#### Move or copy a page within a PDF, using page thumbnails

**1** Click the Pages button to open the Pages panel, and select one or more page thumbnails.

**2** Do one of the following:

- To move a page, drag the page number box of the corresponding page thumbnail or the page thumbnail itself to the new location. A bar appears to show the new position of the page thumbnail. The pages are renumbered.
- To copy a page, Ctrl-drag/Option-drag the page thumbnail to a second location.

#### Move or copy a page between two PDFs, using page thumbnails

**1** Open both PDFs, and display them side by side.

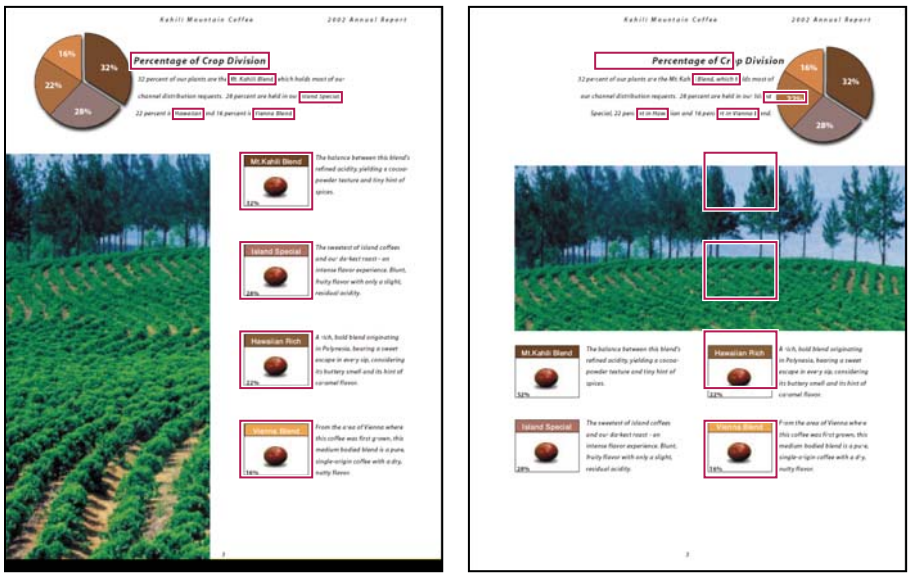
**2** Open the Pages panels for both PDFs, and do one of the following:

- To copy a page, drag the page thumbnail into the Pages panel of the target PDF. The page is copied into the document, and the pages are renumbered.
- To remove a page from one PDF and insert it into another PDF, select the page thumbnail and Ctrl-drag/Option-drag it into the Pages panel of the target PDF. The page is inserted into the target document and deleted from the source document. The pages are renumbered.

## Delete or replace a page

You can replace an entire PDF page with another PDF page. Only the text and images on the original page are replaced. Any interactive elements associated with the original page, such as links and bookmarks, are not affected. Likewise, bookmarks and links that may have been previously associated with the replacement page do not carry over. Comments, however, are carried over and are combined with any existing comments in the document.

After you delete or replace pages, it's a good idea to use the Reduce File Size command to rename and save the restructured document to the smallest possible file size.




*A page before and after it is replaced. The page's bookmarks and links remain in the same locations.*

### Delete pages, using the Delete command

***Note:*** *You cannot undo the Delete command.*

**1** Choose Document > Delete Pages.

**2** Enter the page range to be deleted, and click OK.

You cannot delete all pages; at least one page must remain in the document.

*If you select Use Logical Page Numbers in the Page Display panel of the Preferences dialog box, you can enter a page number in parentheses to delete the logical equivalent of the page number. For example, if the first page in the document is numbered i, you can enter (1) in the Delete Pages dialog box, and the page is deleted.*

### Delete pages, using page thumbnails

**1** In the Pages panel, select a page or group of pages:

- Select the page number box of the thumbnail or the page thumbnail itself.
- Shift-click to select a range of page thumbnails. Ctrl-click/Command-click to add to the selection. Or, in Windows, press Ctrl+A to select all thumbnails, and then Ctrl-click to deselect the pages that you want to keep.
- Drag a rectangle around a group of page thumbnails.

**2** Do one of the following:

- Choose Delete Pages from the Pages panel Options menu, and click OK.
- Click the trash icon at the top of the Pages panel.

### Delete material associated with a tagged bookmark

**1** In the Bookmarks panel, click the tagged bookmark for the material you want to delete. Shift-click to select multiple bookmarks.

**2** Choose Delete Page(s) from the Options menu. The tagged bookmark and its associated page are deleted from the document.

### Replace the contents of a page

**1** Open the PDF that contains the pages you want to replace.

**2** Choose Document > Replace Pages.

**3** Select the document containing the replacement pages, and click Select.

**4** Under Original, enter the pages to be replaced in the original document.

**5** Under Replacement, enter the first page of the replacement page range. The last page is calculated based on the number of pages to be replaced in the original document.

### Replace pages using a page thumbnail

**1** Open the PDF that contains the pages you want to replace, and then open the PDF that contains the replacement pages.

**2** In the Pages panel of the PDF that contains the replacement pages, select a page or group of pages:

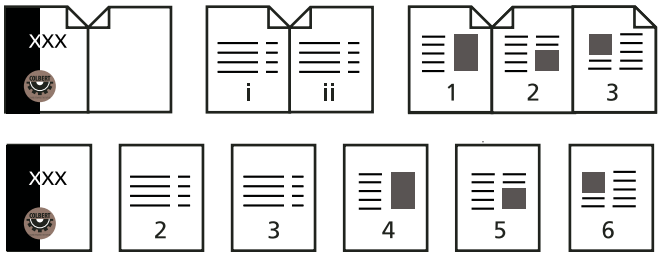
- Select the page number boxes of the page thumbnails that you want to use as replacement pages.
- Shift-click to select multiple page thumbnails. Ctrl-click/Command-click to add to the selection.
- Drag a rectangle around a group of page thumbnails.

**3** Drag the selected page thumbnails onto the Pages panel of the target document. Release the mouse button when the pointer is directly over the page number box of the first page thumbnail you want to replace so that these pages become highlighted.

The pages you selected in the first document replace the same number of pages in the second document, starting at the page number you selected to drop the new pages on.

## Renumber pages

The page numbers on the document pages do not always match the page numbers that appear below the page thumbnails and in the Page Navigation toolbar. Pages are numbered with integers, starting with page 1 for the first page of the document. Because some PDFs may contain front matter, such as a copyright page and table of contents, their body pages may not follow the numbering shown in the Page Navigation toolbar.




*Printed page numbering (top) compared to logical page numbering (bottom)*

You can number the pages in your document in a variety of ways. You can specify a different numbering style for groups of pages, such as 1, 2, 3, or i, ii, iii, or a, b, c. You can also customize the numbering system by adding a prefix. For example, the numbering for chapter 1 could be 1-1, 1-2, 1-3, and so on, and for chapter 2, it could be 2-1, 2-2, 2-3, and so on.

*Using the Number Pages command affects only the page thumbnails on the Pages panel. You can physically add new page numbers to a PDF using the headers and footers feature.*

**1** Click the Pages button to open the Pages panel, and choose Number Pages from the Options menu.

**2** Specify a page range. (Selected refers to pages selected in the Pages panel.)

**3** Select one of the following, and then click OK:

**Begin New Section** Starts a new numbering sequence. Choose a style from the pop-up menu, and enter a starting page number for the section. Specify a prefix, if desired.

**Extend Numbering Used In Preceding Section To Selected Pages** Continues the numbering sequence from previous pages without interruption.

### See also

"Add and edit headers and footers" on page 118

# Chapter 5: Exporting PDFs

If you don't have access to the source files that created an Adobe PDF, you can still copy images and text from the PDF to use elsewhere, or export the PDF to a reusable format. You can also export images in a PDF to another format.

## Quickstart

Following are overview steps to some common conversion tasks.

### Export as Word

If you don't have the original file from which a PDF was created, you can save the PDF as a Word document that you can then edit in Word.

1 Click Export in the Tasks toolbar, and then choose Word Document.

2 Click Settings to set conversion options.

***Note:*** *When you save a PDF to Word format, the resulting file isn't equivalent to a file created in Word; some coding information may be lost.*

#### See also

"Export PDFs as text" on page 136

### Export as HTML or XML

To easily use the content of a PDF on the web, simply convert the PDF to HTML or XML format.

1 Click Export in the Tasks toolbar, and then choose HTML Web Page or XML 1.0.

2 Click Settings to set conversion options.

You can save a PDF in HTML 3.2 format by clicking Export, and choosing More Formats > HTML 3.2.

#### See also

"Export PDFs" on page 133

### Export as text

You can save a PDF in Rich Text Format (RTF), as accessible text, or as plain text. RTF preserves the most formatting. Accessible text preserves such items as comments, form fields, and alternate text.

1 Click Export in the Tasks toolbar, choose More Formats, and then choose the desired text format.

2 If saving to RTF or plain text, click Settings to adjust the conversion settings.

#### See also

"Export PDFs as text" on page 136

## Select and copy text

You can copy words, lines, or columns of text from a PDF.

**1** Using the Select tool, do any of the following:

- Drag across text.
- Double-click or triple-click to select a word or a line of text.

**2** Move the pointer over the icon that appears next to the selected text, and then choose an option from the menu.

If you cannot select text, it may be part of an image or from a scanned document.

### See also

"Select and copy text" on page 137

## Select and copy an image

You can copy an image from a PDF to the clipboard or to another application, or you can save it to a file.

**1** Using the Select tool, click an image or drag to select a portion of it after the pointer changes to a crosshairs icon.

**2** Do any of the following:

- Drag the image into an open document in another application.
- Right-click/Control-click the image and choose Copy Image or Save Image As.

### See also

"Copy images" on page 139

## Take a snapshot of a page

Use the Snapshot tool to copy all selected content. Text and images are both copied as an image.

**1** Choose Tools > Select & Zoom > Snapshot tool.

**2** Drag on the page to select content, or click to copy the entire page.

The selected content is copied to the clipboard when you release the mouse button.

### See also

"Take a snapshot of a page" on page 139

# Exporting PDFs to other file formats

## Export PDFs

You can save a PDF to a number of different file formats, and then open and use that file in other applications. The available formats include both text and image formats. To make a PDF compatible with earlier versions of Adobe Acrobat and Adobe Reader, you can resave the PDF to an earlier version of the PDF format.

**1** With the PDF open, do one of the following:

- Click the Export button in the Tasks toolbar and choose a file format or choose More Formats.
- Choose File > Export, and choose a file format.
- Choose File > Save As, and choose a file format from the menu.

**2** Click Settings to set conversion options. (If the Settings button is unavailable, there are no options for the format that you selected.) Click OK to apply the settings. Conversion settings can also be edited in the Convert From PDF Preferences.

***Note:*** *These conversion settings are stored separately from the settings used with the Export All Images command.*

**3** Click Save to export the PDF to the selected file format.

By default, the source file name is used as the file name, with the new extension, and the exported file is saved in the same folder as the source file. When you save a PDF in an image format, each page is saved as a separate file.

## File format options

When you export PDFs to different file formats using the Save As command, each file format includes unique conversion settings.

*If you want to use the same settings every time you convert PDFs to a particular format, specify those settings in the Convert From PDF preferences. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Convert From PDF from the left. Select a file format from the list and click Edit Settings. (Click the Default button at any time to revert to the default settings.)*

### PostScript or Encapsulated PostScript (EPS) options

You can export a PDF to PostScript for use in printing and prepress applications. The PostScript file includes full DSC (Document Structuring Conventions) comments and other advanced information preserved by Adobe Acrobat Distiller. You can also create an EPS file from any PDF for placement or opening in other applications. The options available depend on whether you are converting a document to PostScript or EPS. (For a complete description of PostScript options, see "PostScript options" on page 334.)

**Printer Description File** The PostScript Printer Description (PPD) provides the necessary information to format a PostScript file correctly for a particular output device. Device Independent creates only composite (not color-separated) PostScript or EPS files. Acrobat Default provides a starting point and reference for creating all types of PostScript and restores all default settings for the conversion. Adobe PDF 7.0 is compatible with most devices.This option is available only for PostScript (PS) format.

**ASCII or Binary** Specifies the output format of image data. Binary output yields smaller files, but not all workflows can accommodate binary output.

**PostScript** Specifies the level of PostScript compatibility. Use Language Level 3 only if the target output device supports it. Language Level 2 is suitable for EPS files that will be placed in another document and color-separated as part of that document. Use Language Level 2 for EPS files that you import into Microsoft applications.

**Page Range** Specifies the pages you want to export. When you export files to EPS output, each page in the range is saved as a separate EPS file.

### HTML or XML options

When you export a PDF file to HTML or XML format, any images in PDF are converted to JPEG format.

**Encoding** Refers to the binary values, based on international standards, used to represent the text characters. UTF-8 is a Unicode representation of characters using one or more 8-bit bytes per character; UTF-16 represents characters using 16-bit bytes. ISO-Latin-1 is an 8-bit representation of characters that is a superset of ASCII. UCS-4 is a Universal Character Set coded in 4 octets. HTML/ASCII is a 7-bit representation of characters developed by ANSI.

Use Mapping Table Default uses the default character encoding defined in mapping tables, which appear in the Plug-ins/SaveAsXML/MappingTables folder. These mapping tables specify many characteristics of how the data is output, including the following default character encodings: UTF-8 (Save as XML or HTML 4.0.1) and HTML/ASCII (Save as HTML 3.2).

**Generate Bookmarks** Generates bookmark links to content for HTML or XML documents. Links are placed at the beginning of the resulting HTML or XML document.

**Generate Tags For Untagged Files** Generates tags for files that are not already tagged, such as PDFs created using Acrobat 4.0 or earlier. If this option is not selected, untagged files are not converted.

***Note:*** *Tags are applied only as part of the conversion process and are discarded after the conversion. This is not a method for creating tagged PDFs from legacy files.*

**Generate Images** Controls how images are converted. Converted image files are referenced from within XML and HTML documents.

**Use Sub-Folder** Specifies the folder in which to store generated images. The default is Images.

**Use Prefix** Specifies the prefix added to the image file names if you have several versions of the same image file. File names assigned to images have the format *filename_img_#*.

**Output Format** Specifies the final format. The default is JPG.

**Downsample To** Downsamples image files to the specified resolution. If you do not select this option, image files have the same resolution as in the source file. Image files are never upsampled.

### JPEG and JPEG2000 options

Note that the options available depend on whether you are exporting a document to JPEG or JPEG2000.

**Grayscale/Color** Specifies a compression setting that balances file size with image quality. The smaller the file, the lesser the image quality.

**Tile Size** Divides the image being compressed into tiles of the given size. (If the image height or width is not an even multiple of the tile size, partial tiles are used on the edges.) Image data for each tile is individually compressed and can be individually decompressed. The default value of 256 is recommended. This option is available only for JPEG2000 format.

**Format** Determines how the file is displayed. Available only for JPEG format.

- **Baseline (Standard)** Displays the image when it has fully downloaded. This JPEG format is recognizable to most web browsers.

- **Baseline (Optimized)** Optimizes color quality of the image and produces smaller file sizes but is not supported by all web browsers.

• **Progressive (3 scans-5 scans)** Downloads the image first as a low-resolution image, with incremental quality improvements as downloading continues.

**RGB/CMYK/Grayscale** Specifies the type of color management to be applied to the output file and whether to embed an ICC profile.

***Note:*** *If you use the Save As or Export All Images command on a PDF that contains JPEG and JPEG2000 images, and export the content to JPEG or JPEG2000 format, the resulting image may look different when opened in Acrobat. This can happen if the images have a color profile included at the page level but not inside the image data. In this case, Acrobat cannot bring the page-level color profile into the resulting saved image.*

**Colorspace/Resolution** Specifies a color space and resolution for the output file. You can let Acrobat determine these settings automatically. To convert color images in the file to shades of gray, choose Grayscale.

***Note:*** *Higher resolutions, such as 2400 pixels per inch (ppi), are suitable only for small page sizes (up to 6.826 inches or 173.380 millimeters).*

### PNG options

PNG format is useful for images that will be used on the web.

**Interlace** Specifies if the image is interlaced. None creates an image that displays in a web browser only after downloading is complete. Adam7 creates an image that displays low-resolution versions in a browser while the full image file is downloading. Adam7 can make downloading time seem shorter and assures viewers that downloading is in progress; however, it increases file size.

**Filter** Lets you select a filtering algorithm.

• **None** Compresses the image without a filter. Recommended for indexed-color and bitmap-mode images.

• **Sub** Optimizes the compression of images with even horizontal patterns or blends.

• **Up** Optimizes the compression of images with even vertical patterns.

• **Average** Optimizes the compression of low-level noise by averaging the color values of adjacent pixels.

• **Paeth** Optimizes the compression of low-level noise by reassigning adjacent color values.

• **Adaptive** Applies the filtering algorithm—Sub, Up, Average, or Paeth—best suited for the image. Select Adaptive if you are unsure of which filter to use.

**RGB/CMYK/Grayscale** Specifies the type of color management for the output file and whether to embed an ICC profile.

**Colorspace/Resolution** Specifies a color space and resolution for the output file. You can let Acrobat determine these settings automatically. To convert color images in the file to shades of gray, choose Grayscale.

***Note:*** *Higher resolutions, such as 2400 ppi, are suitable only for small page sizes (up to 6.826 inches or 173.380 millimeters).*

### TIFF options

TIFF is a flexible bitmap image format supported by virtually all paint, image-editing, and page-layout applications. Resolution is determined automatically.

**Monochrome** Specifies a compression format. CCITTG4 is the default and generally produces the smallest file size. ZIP compression also produces a small file.

***Note:*** *Some applications cannot open TIFF files that are saved with JPEG or ZIP compression. In these cases, LZW compression is recommended.*

**RGB/CMYK/Grayscale/Other** Specifies the type of color management for the output file.

**Colorspace/Resolution** Specifies a color space and resolution for the output file. You can let Acrobat determine these settings automatically. To convert color images in the file to shades of gray, choose Grayscale.

***Note:*** *Higher resolutions, such as 2400 ppi, are suitable only for small page sizes (up to 6.826 inches or 173.380 millimeters).*

## Export PDFs as text

If you have a PDF version of a document, but you don't have the original application file, you can export the text to Rich Text Format (RTF), a standard for exchanging content between text-editing applications, or Microsoft Word format. Images in the PDF are saved by default in JPEG format. The text file you obtain when you export a PDF to RTF or Word format is not equivalent to the source file in the authoring application. Some coding information may be lost in the conversion.

You can also export a PDF to plain text or accessible text. Accessible text follows the reading order preference selected in the Reading preferences, and includes comments and form fields in its output. Accessible text also includes some formatting, such as line breaks. Any alternate text in the document tags is used in place of images and figures. Plain text follows the structure order of text in the document and ignores all artifacts and figure elements in the conversion. Hard hyphens are preserved, and soft hyphens are removed.

**1** Do one of the following:

- Click the Export button in the Tasks toolbar, and choose Word Document.
- Choose File > Save As, and then choose a text format: Microsoft Word Document (*.doc); Rich Text Format (*.rtf); Text (Accessible) (*.txt); or Text (Plain) (*.txt).

**2** Click Settings, select the options you want, click OK, and click Save.

### Word and RTF options

(For a list of plain text options, see the options for HTML and XML.)

**Include Comments** Preserves PDF comments.

**Include Images** Includes images in the final output. The default image format is JPEG.

**Output Format** Specifies the image format. Select JPEG or PNG, and then select the color space and resolution options.

**Use Colorspace** Specifies the color space. You can choose Color or Grayscale, or let the color space be determined automatically.

**Change Resolution** Downsamples images. If you do not select this option, images are created at the same resolution as in the PDF.

**Downsample To** Specifies the resolution for downsampling images. Images are never upsampled.

## Export images to another format

In addition to saving every page (all text, images, and vector objects on a page) to an image format using the File > Save As command, you can export each image in a PDF to an image format.

***Note:*** *You can export raster images, but not vector objects.*

**1** Choose Advanced > Document Processing > Export All Images.

**2** In the Export All Images As dialog box, choose a file format for the images.

By default, exported image files use the source file name.

**3** Click Settings.

**4** In the Export All Images As Settings dialog box, select the file settings, color management, and conversion settings for the file type.

**5** For Exclude Images Smaller Than, select the smallest size of image to be extracted. Select No Limit to extract all images.

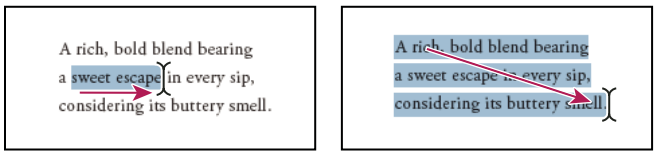
**6** Click OK. In the Export All Images As dialog box, click Save or OK.

# Reusing PDF content

## Select and copy text

The Select tool lets you select horizontal and vertical text or columns of text in a PDF. You can use the Copy and Paste commands to copy the selected text into another application. If you hold the pointer over the text selection, a menu appears that lets you copy, highlight, or underline the text, among other options. Note the following:

- If you're unable to select text, the text may be part of an image. Export image text to text that can be selected by using either the File > Create PDF > From Scanner command or the Document > OCR Text Recognition > Recognize Text Using OCR command.
- If the Cut, Copy, and Paste commands are unavailable when you select text, the author of the PDF may have set restrictions against copying text.
- If the text you copy uses a font that isn't available on your system, the font will be substituted with a close match or a default font.




*Select text by dragging from an insertion point to an end point (left) or by dragging diagonally over text (right).*

### See also

"Open secured PDFs" on page 195

#### Select a word or line of text

**1** Move the Select tool over the text you want to select. When the pointer changes to the I-beam icon, do one of the following:

- Drag across the text to be selected. (You can also click to create an insertion point, and Shift-click to create a second insertion point. The text between the two insertion points is selected.)
- Double-click to select a word.
- Triple-click to select a line of text.

**2** If you want to extend a selection letter by letter, press Shift and an arrow key. To extend a selection word by word, press Shift+Ctrl (Windows) or Shift+Command (Mac OS) and an arrow key.

### Select a column of text

**1** Using the Select tool, move the pointer toward a column of text. When the pointer changes to a vertical bar with a box superimposed, the Select tool is in column select mode.

*You can force column select mode by pressing the Alt key (Windows) or the Command key (Mac OS) as you drag a rectangle over the column of text.*

**2** Drag a rectangle over the column of text. To select text in more than one column, drag from the beginning of the text in one column to the end of text you want to select.

### Select all the text on a page

**1** Choose View > Page Display > Single Page.

**2** Do one of the following:

- Choose Edit > Select All.
- Select any text on the page and then press Ctrl+A (Windows) or Command+A (Mac OS).
- Click four times in the text. This method selects all the text on the page regardless of the page layout.

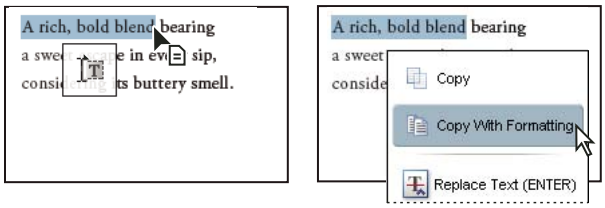
***Note:*** *If you choose any other page layout, all the text in the document is selected.*

### Copy selected text

**1** Use the Select tool to select any amount of text on the page.

**2** Copy the text:

- Choose Edit > Copy to copy the selected text to another application.
- Hold the pointer over the selection until a menu appears, and then select Copy.
- Hold the pointer over the selection until a menu appears, and then choose Copy To Clipboard or Copy With Formatting. (Copy With Formatting, which preserves the column layout, appears only if the document is tagged properly.)




*A menu appears when you hold the pointer over selected text.*

You can paste copied text into comments and bookmarks as well as into documents authored in other applications.

## Copy tables and charts

**1** Using the Select tool, highlight the entire table or the rows and columns to be copied.

**2** Right-click/Control-click the selection, and choose one of the following options:

**Copy As Table** Preserves formatting when you copy the table to Excel. In Excel, use the Paste Special command and select XML Spreadsheet.

**Save As Table** Lets you paste the table to a new file.

**Open Table In Spreadsheet** Opens the table in a CSV-compliant application, such as Excel.

*To copy a table in RTF, drag the selected table into an open document in the target application.*

## Copy images

You can copy and paste individual images from a PDF to the clipboard (Windows only), to another application, or to a file using the Select tool.

If you cannot select an image because of overlapping text, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), select General on the left, and select the Make Select Tool Select Images Before Text option.

**1** Using the Select tool, do one of the following:

- To select the entire image, click it or drag a rectangle around it.
- To select a portion of an image, hold the pointer over the image until the crosshairs icon appears, and then drag a rectangle around the portion.

***Note:*** *To deselect an image and start over, click outside it.*

**2** Copy the image:

- Choose Edit > Copy, and then choose Edit > Paste to paste the image in an open document in another application.
- Right-click/Control-click the image and choose an option to copy the image to the clipboard or to a new file.
- Drag the image into an open document in another application.

### See also

"Export images to another format" on page 136

## Take a snapshot of a page

You can use the Snapshot tool to copy all selected content (text, images, or both) to the clipboard or to another application. Text and images are copied as an image.

**1** Select the Snapshot tool by choosing Tools > Select & Zoom.

**2** Do one of the following:

- Click anywhere in the page to capture the entire content displayed on the screen.
- Drag a rectangle around the text or images, or a combination of both.
- Drag a rectangle within an image to copy just a portion of the image.

Colors in the selected area are inverted momentarily to highlight the selection. The selection is copied automatically to the clipboard when you release the mouse button. If a document is open in another application, you can choose Edit > Paste to paste the copied selection directly into the target document.

*You can save all the images from a PDF. See "Export images to another format" on page 136*

# Chapter 6: Review and comment

You can conduct reviews for many types of content by sending out an Adobe PDF version of the source document for others to review, or by posting a PDF to a shared server. Reviewers add their comments to the PDF using commenting and markup tools and then send, or upload, their comments.

If you create documents in Microsoft Word for Windows, you can import comments directly into the source document to revise the content.

## Quickstart

The following steps provide a quick overview of common review and commenting tasks.

### Start an email review

An email-based review lets you track review status and merge received comments into the PDF.

1 Click Review & Comment and choose Attach For Email Review.

2 If prompted, enter your identity information to create a reviewer profile.

3 Follow the on-screen instructions to select the PDF, invite reviewers, and send the email invitation.

If your email application doesn't send email automatically, you may need to answer alert messages and switch to your email application to finish sending the message.

#### See also

"Start an email-based review" on page 147

### Start a shared review

A shared review allows reviewers, including those using Adobe Reader, to see and respond to others' comments during the review.

***Important:*** *To conduct a shared review, you and your reviewers need write access to a shared comment server.*

1 Click Review & Comment and choose Send For Shared Review.

2 If prompted, enter your identity information to create a reviewer profile.

3 Follow the on-screen instructions to select (or add) a server, select the PDF, invite reviewers, and send the email invitation.

#### See also

"Start a shared review" on page 146

## Invite additional reviewers

If you initiated a review, you can invite more reviewers. If you are a reviewer, ask the initiator to add reviewers so the initiator can track all reviewers and receive notification when comments are received.

1 Click Review & Comment, and choose Review Tracker.

2 Select the desired PDF under Reviews I've Sent, and click Add Reviewers.

3 Follow the on-screen instructions to add email addresses, change the message as needed, and send the invitation.

### See also

"Invite additional reviewers" on page 149

## Track and manage reviews

The Review Tracker provides information for all documents that you've sent and received for review. Use the Review Tracker to rejoin a review, send a reminder, or invite additional reviewers.

1 Click Review & Comment, and choose Review Tracker.

2 Select the desired PDF on the left.

3 Do any of the following:

- To rejoin a review, double-click the PDF.
- To send a message, click Email All Reviewers or Email Initiator.
- To invite additional reviewers, click Add Reviewers.

### See also

"Tracking PDF reviews" on page 155

## Start a meeting

If you have an Adobe Acrobat Connect account, you can start a meeting to review PDFs in a web browser. You can also create a trial account to start a meeting.

***Note:*** *Acrobat Connect is not available in all languages.*

1 Click Start Meeting in the Tasks toolbar.

2 Click Log In, and then type your Meeting URL, login, and password. (Or click Create Trial Account and follow the on-screen instructions.)

3 Click Send An E-mail Invitation or Share My Screen.

### See also

"Start a meeting" on page 150

## Participate in an email review

When you open the PDF attachment in an email review, a tracked copy of the PDF opens with a document message bar, a Send Comments button, and a Comment & Markup toolbar.

***Important:*** *If you're prompted to connect to a server when you open the PDF, you've been invited to a shared review.*

1. Open the PDF attachment from your email application.
2. Use commenting tools to add comments.
3. Save the PDF, and then click Send Comments.

### See also

"Review a PDF" on page 151

## Participate in a shared review

When you open the shared PDF, commenting tools and a document message bar with instructions also open.

1. Open the PDF attachment or link.
2. Click Connect, and type your login name and password, if prompted.
3. Type your name, email address, and job title to create a reviewer profile, if prompted.
4. Add comments.
5. When you want to share your comments, click Publish Comments.

In a shared review, you can see all reviewers' comments that have been published.

### See also

"Review a PDF" on page 151

## Add a sticky note

The sticky note is the most common type of comment.

1. Click Review & Comment in the Tasks toolbar, and then choose Add Sticky Note.
2. Type your comment in the pop-up note. (Your comment remains if you close the note.)
3. (Optional) Drag the sticky note icon or pop-up window to a new location.

You can also add other types of comments, such as markups and text edits.

### See also

"Add a sticky note" on page 161

## Mark up text with edits

Add editing markups to indicate where text should be inserted, deleted, or replaced.

1. Click Review & Comment, and choose Comment & Markup Tools > Text Edits Tool.
2. Select the text you want to edit or place the insertion point where you want to add text.
3. Move the pointer over the icon that appears, and choose an option from the pop-up menu, or simply begin typing.

### See also

"Mark up text with edits" on page 162

### Create drawing markups

You can add lines, arrows, and shapes to a PDF by using the drawing markup tools.

1 Choose Tools > Comment & Markup, and choose the desired tool.

2 Draw in the PDF. For example, click and drag to form a line, arrow, or rectangle.

3 (Optional) Using the Select tool, double-click the markup, and then type a comment in the pop-up note.

To change properties, such as line color and width, right-click/Control-click the markup and choose Properties.

#### See also

"Add a line, arrow, or shape" on page 166

# Preparing for a PDF review

## Choosing a review type

While you can send out a PDF for review through email, it's easier to set up a managed review using a wizard. That way you don't have to do the work of importing comments, enabling commenting for Adobe Reader users, or manually tracking reviewer responses.

***Note:*** *Acrobat Professional is required to enable commenting for Adobe Reader users in shared reviews and email-based reviews.*

Acrobat includes three types of managed reviews. Each type of review has a wizard that helps you distribute a PDF with special tools and instructions to reviewers. The Review Tracker tracks all managed reviews and provides access to the PDF file and to information about the review and its participants.

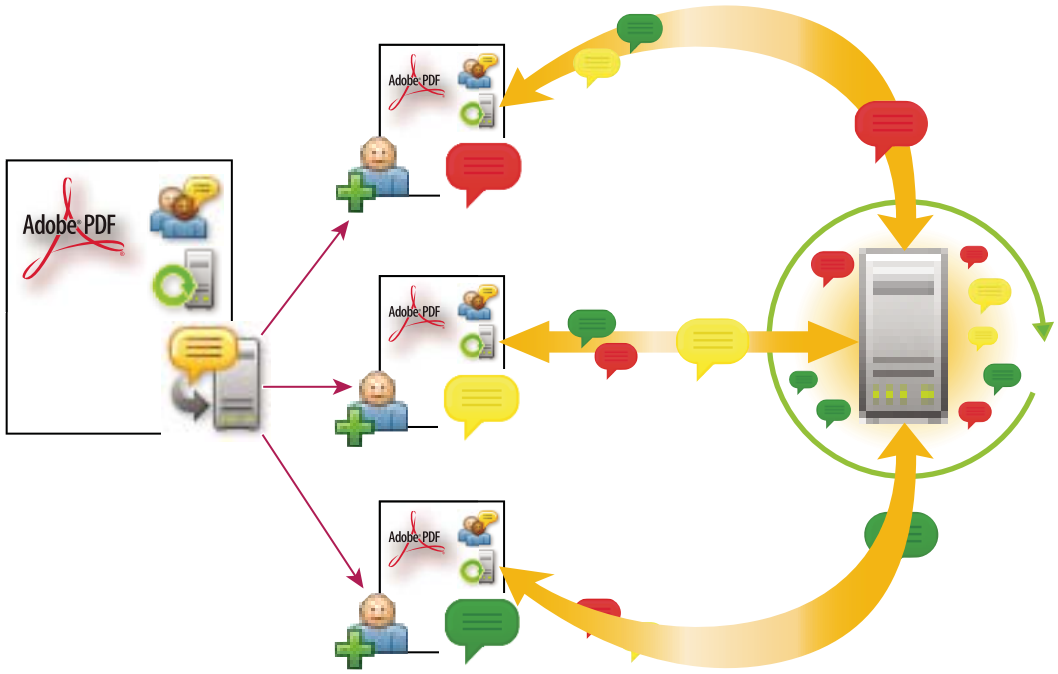
Shared reviews and email-based reviews are the best choices for most document reviews. To initiate any managed review, you need a supported email application and a mail server connection. (No additional server software is required for shared or browser-based reviews.) In addition to managed reviews, Acrobat offers a meeting option that lets you share your desktop with others to collaborate on documents. (See "Start a meeting" on page 150.)

#### Shared reviews

Shared reviews are best for groups that work behind a firewall and have access to a remote server. Shared reviews are the most collaborative form of review because participants can read and reply to each other's comments whether they review the PDF locally, as an email attachment, or on a remote server. Reviewers outside the firewall can also participate by sending their comments to a reviewer within the firewall, who then publishes them to the shared PDF.

Of all the managed reviews, shared reviews provide the most detailed information about the active review. A notification feature lets you know when new comments are available, even when Acrobat is closed, and you're informed of all recent review activity each time you open the PDF. Published comments are saved to the server and to the local hard drive, and Acrobat synchronizes comments between these two locations at regular intervals to download all the latest comments and changes.

***Note:*** *To view other reviewers' comments in a shared review, you must use Acrobat 8 or Adobe Reader 8. Reviewers using Acrobat 6.0 or 7.0 must send their comments in email. Shared reviews do not support commenting in Acrobat 3D files.*




*In a shared review, the PDF file contains special information that lets recipients easily join the review and share their comments.*

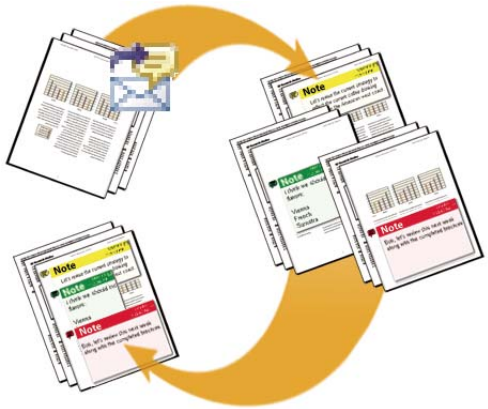
### Email-based reviews

Email-based reviews are ideal for soliciting feedback from individuals who either don't have access to a remote server or who don't require a collaborative approach to reviewing documents.

In an email-based review, the initiator sends a PDF to reviewers as an email attachment. Reviewers add their comments to the PDF and return the document by using the Send Comments button in either the Comment & Markup toolbar or the document message bar. When receiving these comments, the initiator can merge them into their copy of the PDF.

The primary limitation to email-based reviews is that participants can't view each other's comments during the review. Initiators can view comments only after receiving them.

***Note:*** *Acrobat 6.0 or later or Adobe Reader 7.0 or later is required to participate in an email-based review.*



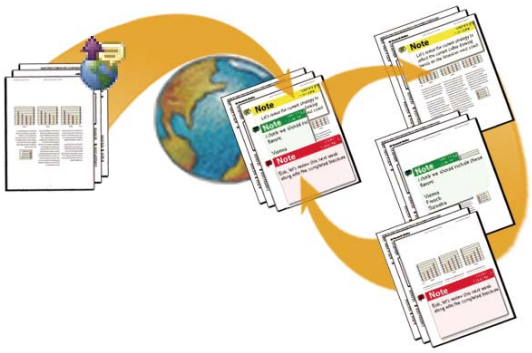
*In an email-based review, participants send their comments to the initiator, who merges the comments into the master copy of the PDF.*

### Browser-based reviews

Like shared reviews, browser-based reviews are suitable for collaborative groups with access to a shared server. Reviewers can view each other's comments during the review process. In a browser-based review, the initiator uploads a PDF to the server and then sends an email invitation to reviewers. The invitation includes a setup file that, when clicked, opens the PDF in the default browser. Reviewers click the Send Comments button in the Comment & Markup toolbar to upload their comments, which are stored in a comments repository on the shared server.

Browser-based reviews lack many of the advantages of shared reviews in terms of setup and tracking tools, and support for network folders. In addition, Acrobat must download all comments in the PDF each time you join the review, often a time-consuming process. For these reasons, Adobe recommends shared reviews as the preferred collaborative method.

***Note:*** *Acrobat 6.0 or later is required to participate in browser-based reviews. (Adobe Reader users cannot participate.)*



*In a browser-based review, the initiator uploads a PDF to the server and sends a setup file to the reviewers, who can see each other's comments.*

## Select an email application for reviews

You need an email application and a mail server connection to send a PDF for review and to send comments. Acrobat supports most email applications. If more than one email application is installed on your system, Acrobat might not start the preferred application when it sends a PDF as an attachment. To specify which application starts, do one of the following:

- (Windows) Double-click Internet Options in the Control Panel. In the Internet Properties dialog box, select the Programs tab, and then select the preferred email application. Restart Acrobat for the changes to take effect.
- (Windows) Change the MAPI settings in your email application. Adobe Reader uses the Messaging Application Program Interface (MAPI) to communicate with your email application. Most email applications come with MAPI settings to handle this communication. For more information on configuring your email applications, see the email application's Help.
- (Mac OS) In Mail, choose Mail > Preferences, select General, and then choose the preferred email application from the Default Email Reader menu. Restart Acrobat for the changes to take effect. If your application isn't listed, choose Select from the menu and browse to the location. If you select an application that isn't listed in the Default Email Reader menu, Acrobat may not support it.

After you verify that Acrobat works with your email application, you can initiate a review.

## Specify a server for comments

You must specify a server location to store all the comments that are submitted during a shared review or a browser-based review. This server location is referred to as the *comment server* (also called a *comments repository*). Reviewers must have read and write access to the comment server you specify. Ask your network administrator to provide a suitable server location for storing comments. No additional software is required to set up a comment server.

For a shared review, you can specify a network folder, a WebDAV server, or a Windows server running Microsoft SharePoint Services. If all reviewers are within a local area network, network folders and SharePoint servers are the best choices for a comment server—network folders being the cheapest and most reliable. To initiate a review on a SharePoint server, the initiator must use Windows; however, reviewers can use either Windows or Mac OS. All participants must have read and write access to the Document Library folder within the specified workspace. WebDAV servers (web servers that use the WebDAV protocol) are best used only if you have reviewers that are outside of a firewall or local area network.

For a browser-based review, you can specify either a network folder or a WebDAV server. If you use a network folder, comments may not be viewable to reviewers on both platforms. Even if all reviewers use the same platform, they may not see comments if they access the server location as a mapped drive instead of by its full file path. If you use a WebDAV server, make sure that all reviewers have unique login names that aren't differentiated solely by case.

### Specify a server for shared reviews

❖ Start the wizard to initiate a shared review, click Add Folder, and follow the on-screen instructions.

### Specify a server for browser-based reviews

**1** Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Reviewing from the list on the left.

**2** For the Online Comments Repository, choose a server type from the menu.

**3** To specify the server settings, do one of the following, and then click OK:

- Click Browse (Windows) or Choose (Mac OS) to select a network folder, and then click OK.
- Type the path in the Administrator Provided Server Settings box. For example, type a WebDAV server using a web address (such as http://server/folder), or a network folder using a UNC (Universal Naming Convention) address (such as \\server\folder).
- If your organization subscribes to automatic configuration services, click Configure Automatically.

If the server information changes for subsequent reviews, you must respecify the location.

# Starting and managing a review

## Start a shared review

To conduct a shared review, you and your reviewers must have read and write access to the server you use for storing comments. (See "Specify a server for comments" on page 146.)

The shared PDF that you send includes the Comment & Markup toolbar and instructions in the document message bar.

**1** Start the setup wizard for a shared review:

- Click the Review & Comment button in the Task toolbar and choose Send For Shared Review.
- Choose Comments > Send For Shared Review.

**2** If prompted, type your name, email address, and job title in the Review Profile dialog box, and click OK.

**3** Choose the shared location that you'll use to store comments, or click Add New Location. If you set up a new location, type a descriptive name, specify the type of server (network folder, SharePoint workspace, or WebDAV folder), and click Next. Type the full path of the folder location, using the examples in the screen, or browse to select the folder. Verify that you have write access to that location, and then click Add Folder and click Next.

**4** Select the PDF to be reviewed, and then specify whether to send it as an email attachment, or to post it on the network and send an email invitation with a URL. If you want to distribute the PDF later or use a different method (such as FTP), select the option to save a copy to your local hard drive. Click Next.

**5** Specify reviewers by typing their email addresses, or by clicking Address Book and selecting email addresses from a Lotus Notes or Microsoft Outlook address book. Insert a semicolon or a return between each address. If you want to specify a date when the review ends, select Set Deadline, and enter the month, day, and year. Click Next.

**6** Review the invitation, and then click Finish.

The shared PDF now contains the following information: the email addresses of reviewers, the path to the shared folder, and the initiator's profile. No matter when or how you send this PDF, each recipient gets this information, which appears in the Welcome screen with news of recent activity when the PDF is opened.

**7** If you're sending the shared PDF as an email attachment and your email application doesn't let you send email automatically for security reasons, answer any alert messages that this application might return, and send the message.

If you distribute the shared PDF after the review has started, any review comments that have been published up to that point will appear in the file, even if the recipient doesn't have access to the comment server.

### See also

"Save the PDF with comments" on page 156

## Start an email-based review

When you start an email-based review, you send out a tracked copy of the PDF, enabling you to easily merge comments that you receive. (Form fields in a PDF aren't fillable during the review.)

#### Start the review

Before you start an email-based review, make sure that your email application is configured to work with Acrobat. (See "Select an email application for reviews" on page 145.)

**1** Start the email-based review wizard by using any of these methods:

- Click the Review & Comment button in the Task toolbar and choose Attach For Email Review.
- Choose Comments > Attach For Email Review.



*You can also start an email-based review directly from other applications that use PDFMaker, such as Microsoft Word. Choose Adobe PDF > Convert To Adobe PDF And Send For Review, or click the Convert To Adobe PDF And Send For Review button. For Office 2007 applications, choose Acrobat > Create And Send For Review.*

**2** If prompted, enter information in the Identity Setup dialog box.

**3** Specify a PDF if it isn't already open, and then click Next. The PDF that you specify becomes the master file. You'll merge comments you receive from reviewers into this file.

**4** Specify reviewers by typing their email addresses, or by clicking Address Book and selecting email addresses from a Lotus Notes or Microsoft Outlook address book. Insert a semicolon or return between each address.

**5** To specify that persons other than yourself receive the review comments, click Customize Review Options and type the email addresses of those individuals in the Request That Reviewers Return Their Comments To box. Click OK.

**6** Click Next to preview the email invitation, and then click Send Invitation. If your email application doesn't let you send email automatically for security reasons, answer any alert messages that this application might return, and send the message.

A copy of the PDF is sent to the reviewers as an attachment. When reviewers open this file attachment, Acrobat presents commenting tools and a PDF that provides instructions.

#### Merge comments

After you receive comments from reviewers, you can merge the comments into the master PDF so that they're in one location.

**1** After a reviewer sends you comments, open the attached file in your email application. If the email application can't find the original version of the PDF, it prompts you to browse for it.

***Note:*** *If you didn't initiate the review and you receive comments that you want to forward to the initiator, merge these comments into your copy of the PDF and then send them (see "Send comments in email" on page 153). If you've already sent your comments, the initiator will receive only new comments. Merged comments retain the original author name.*

**2** If you initiated the review, the Merge Comments dialog box appears. Select one of the following options:

**Yes** Opens the master copy of the PDF and merges all comments into it. After comments are merged, save the master PDF.

**No, Open This Copy Only** Opens the reviewer's copy of the PDF with comments. If you select this option, you can still merge comments by choosing Comments > Merge Comments Onto Master PDF.

**Cancel** Closes the reviewer's PDF that contains comments.



*You can hide comments that you don't want to merge by using the Sort menu in the Comments list. Save and reopen the PDF, and then select Yes in the Merge PDF dialog box.*

## Start a browser-based review

When you initiate a browser-based review, a PDF is uploaded to a server, and reviewers receive an email message with a setup file in Forms Data Format (FDF). When reviewers click this file, the PDF opens in the default web browser and review settings are configured to enable comments to be uploaded to the remote server. Uploaded comments are stored as an FDF file in the *comments repository,* an online location that is accessible to all reviewers. You can set up the comments repository on the same or a different server as the uploaded PDF.

***Note:*** *Add comments to the PDF after you upload it to the server. If you add comments to the PDF before you upload it to the server, the comments are embedded in the PDF, and you can't edit them later.*

**1** Specify the comments repository in the Reviewing preferences. (See "Specify a server for comments" on page 146.)

**2** Start the setup wizard by choosing Comments > Upload For Browser Review.

**3** If you're prompted to enter information in the Identity Setup dialog box, do so.

**4** Specify the PDF to upload, and then click Next.

**5** Select a server, using either of these methods:

- Type the path for the server location in the text box, and click Next.
- Click Browse (Windows) or Choose (Mac OS) to select a network folder, click Save, and click Next.

You can upload the PDF to a WebDAV server using a web address (such as http://server/folder), or to a network folder using a UNC (Universal Naming Convention) address (such as \\server\folder).

**6** In the Invite Reviewers box, specify reviewers by typing their email addresses, or by selecting email addresses from a Lotus Notes or Microsoft Outlook address book. Insert a semicolon or return between each address. Click Next.

**7** Edit the invitation message as necessary, and then click Send Invitation.

**8** If your email application doesn't let you send email automatically for security reasons, make the email application active, answer any alert messages that this application might return, and send the message.

**9** To make sure that the setup is correct, add a comment to the document, and then click the Send And Receive Comments button in the Comment & Markup toolbar. If your comments aren't uploaded to the server, your Reviewing preferences settings are likely incorrect. Contact your network administrator for assistance.

### See also

"Save the PDF with comments" on page 156

## Invite additional reviewers

If you're the review initiator, you can invite others to participate in the review. If you're a reviewer and want other people to participate, ask the review initiator to invite them. That way, the initiator can automatically track all participants and receive notification when their comments are received.

**1** Do one of the following:

- Choose Comments > Invite Additional Reviewers.
- Choose Comments > Review Tracker, select the PDF, and then click Add Reviewers on the right.

**2** Specify the email addresses of the reviewers to be added, change the message as needed, and then send the message.

Additional reviewers appear with other participants in the right pane of the Review Tracker.

## Send a message

During a review, you may want to contact other reviewers or send them a reminder of their approaching deadline.

**1** Do one of the following:

- Choose Comments > Send Review Reminder.
- Choose Comments > Review Tracker, select the PDF, and click Email All Reviewers.

**2** In the email message, make changes as needed to the To and Subject boxes or in the body of the email message, and then click Send.

# Meetings

## Start a meeting

From Acrobat, you can start a meeting to share your desktop and review PDF documents. Adobe Acrobat Connect is a personal web-conference tool that you can access from Acrobat to conduct real-time meetings on your desktop. Attendees join the meeting by logging into a web-based meeting space from their own computers.

You must have an Acrobat Connect account to start and attend meetings. You can subscribe or set up a trial account by clicking the Start Meeting button in Acrobat to get started.

***Note:*** *Acrobat Connect is not available in all languages.*

**1** To start a meeting, do one of the following:

- Click the Start Meeting button.
- Choose File > Start Meeting.

**2** In the dialog box that appears, do one of the following:

- If you have an account, click Log In. Type the Meeting URL, login, and password for your Acrobat Connect account, and then click Log In. Your Acrobat Connect account uses your Adobe ID (your email address) for your login.

***Note:*** *You can also use Meeting URLs for Macromedia Breeze® and Adobe Acrobat Connect Pro accounts. These accounts require a login that is different than your Adobe ID.*

- If you don't have an account, click Create Trial Account, and follow the on-screen directions.

**3** Do one of the following:

- To invite participants to a meeting, click Send An E-mail Invitation, type the email addresses of those you want to invite, and then click Send.
- To share the document that's displayed on your screen, click Share My Screen.

As participants join the meeting, their names appear in the Attendee List.

**4** Do any of the following:

- Type a message in the Chat pod, select who to send the message to, and click the Send Message button.
- Take notes in the Notes pod and send them out after the meeting.
- If you want another attendee to share his or her desktop, select that person's name in the Attendee List, click the Set User Role button, and choose Set As Presenter.

## Attend a meeting

If you don't have an Acrobat Connect account, you can join a meeting as a guest.

***Note:*** *Acrobat Connect is not available in all languages.*

**1** In the email invitation, click the URL for the meeting or type the Meeting URL in the address box of a browser.

**2** Type the login and password for your Acrobat Connect account, or log in as a guest.

**3** In the Acrobat Connect meeting, do any of the following:

- To send a message, type it in the Chat pod, select who to send it to, and click the Send Message button.
- To clear the Chat pod or change the font size, click the Pod Options button and choose an option.

- To take notes, type them in the Note pod.

### Acrobat Connect preferences

When you start an Acrobat Connect meeting, the Meeting URL and login you provide are stored in the Acrobat Connect preferences. To change your Acrobat Connect account settings, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Meeting on the left.

The login for your Acrobat Connect account is your Adobe ID. To change your login, create a new Adobe ID on the Adobe website.

***Note:*** *Acrobat Connect is not available in all languages.*

# Participating in a PDF review

## Review a PDF

When you receive an email invitation to a PDF review, the invitation typically includes the PDF as an attachment or provides a URL to the PDF. Alternatively, you may receive a Forms Data Format (FDF) attachment. When opened, an FDF file configures your review settings and opens the PDF in a web browser.

PDFs in a review have special features, including commenting tools and a document message bar with instructions. Use the commenting tools to add comments to the PDF and then submit them, either by publishing comments to a comment server where others can see them, or by sending comments as an email attachment to the review initiator.

***Note:*** *If you receive a PDF that doesn't include special features, add your comments using tools from the Comment & Markup toolbar, save the PDF, and then send it back. (See "Commenting and markup tools overview" on page 158.)*

To review the PDF later, reopen it from the Review Tracker to ensure that your comments are added to the tracked copy of the PDF, and that the initiator receives your comments. If you don't send or publish your comments right away, save the PDF before you close it to avoid losing your comments. Until the initiator receives your comments, they appear only in your local copy of the PDF and aren't visible to other reviewers.

If you review a PDF using a version earlier than Acrobat 8 or Reader 8, some features may not be available.

### See also

"Reply to comments" on page 172

"Rejoin a review" on page 154

"Save the PDF with comments" on page 156

#### Join a review

1. In your email application, open the PDF by double-clicking the attachment (PDF or FDF) or URL.
2. Do one or more of the following, if prompted:

- Click Connect in the Join Shared Review dialog box.
- Click OK in the Welcome To Shared Review window. This window tells you who's invited to the review and if they've made any comments, and it tells where the comment server is located.

- Type your login name and password for the comment server. If you don't have access to the comment server, click Work Offline, or click Save And Work Offline in the Comment & Markup toolbar.
- Type your name, email address, company name, and job title, if prompted.

**3** Save the file to a location that you can find easily, such as the desktop.

**4** Add comments to the PDF using tools in the Comment & Markup toolbar. If you need to delete a comment, select it and press Delete. (You can delete only comments that you made.)

**5** Do all of the following that apply:

- If you're notified that new comments from other reviewers are available, click the message. New comments appear in the PDF.
- If you want to find out if new comments are available from other reviewers, click the Check For New Comments button .

**6** Submit your comments by doing one of the following:

- Click Publish Comments in the document message bar.
- Click Send Comments or Send And Receive Comments in the Comment & Markup toolbar.
- Choose Comments > Send Comments To Review Initiator.

When you send comments, a PDF containing your comments is sent as an email attachment to the review initiator. When you publish comments, your comments are saved to the comment server.

### Options in the document message bar

The options that are available in the document message bar depend on how the initiator set up the review and whether you can access the comment server. Similar options may also appear in the Comment & Markup toolbar.

For information about the different types of reviews, see "Choosing a review type" on page 143.

**Check For New Comments** Prompts Acrobat to synchronize comments between the comment server and the local hard drive. If you don't click this button, Acrobat checks for new comments at the intervals specified in the Reviewing preferences. This button is available only when new comments are published to the server in a shared review.

**Merge Comments** Copies the comments in the open PDF to your copy. This option is available only for PDFs you receive from reviewers in email-based reviews.

**Publish Comments** Uploads your new comments to the comment server. This option is available only in shared reviews.

**Send Comments** Creates an email message addressed to the review initiator that contains the commented PDF as an attachment. This option is always available in email-based reviews, and it appears in shared reviews only after an attempt to connecting to the comment server has failed.

**Status** Displays the connected state of the comment server. If clicked, a menu with additional options appears. Review Tracker opens the Review Tracker. Save As Archive Copy saves a copy of the PDF that is no longer connected to the review. Work Offline saves a copy of the PDF that is temporarily disconnected from the review. Reconnect To Server appears only in the PDF you created by choosing Work Offline.

## Check for newly published comments

When you participate in a shared review, Acrobat synchronizes published comments on your local drive with those on the comment server, and then notifies you when new comments are available. Notifications appear as bezel-style messages in the open PDF. In Windows, notifications also appear as balloon-style messages in the notification area (system tray). Because synchronization continues after the PDF is closed, you'll continue to receive notifications.

Messages in the notification area inform you when new reviewers join the review, when updates occur (multiple reviews), and when synchronization attempts fail. They also inform you when a new broadcast subscription is added in the Review Tracker. You can change how often messages appear and how often comments are synchronized, and you can manually trigger the synchronization process.

### View new comments

To view new comments, you must be able to connect to the network where the comment server is located. If you can't connect, check the server status in the Review Tracker to determine the cause of the problem. (See "Check server status" on page 156.)

❖ Do one of the following:

- Click the Check For New Comments button in the document message bar.
- Choose Comments > Check For New Comments.
- Click the message in the notification area (Windows).

### Change frequency of synchronization and notifications

**1** Open the Reviewing preferences:

- Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then click Reviewing on the left.
- In Windows, right-click the notification icon in the notification area, and choose Reviewing Preferences.

**2** Move the sliders to change the following settings:

**Check For New Comments** The top slider specifies (in minutes) how often comments are synchronized when a shared PDF is open. The bottom slider specifies (in hours, weeks, days, or months) how often comments are synchronized when a shared PDF is closed.

**Show Review Tracker Alerts** Specifies how often alert messages appear.

### Disable notifications

❖ Do one of the following:

- Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), click Reviewing on the left, move the slider for Show Review Tracker Alerts to the far left until the value Never appears, and then click OK.
- In Windows, right-click the notification icon in the notification area. If a check mark appears next to Show Review Notifications, select that option so a check mark no longer appears.

## Send comments in email

If you review a PDF offline or outside of a firewall, or if you lose your connection to the comment server, you may need to send your comments in an email message.

❖ Do one of the following:

- Click the Email button in the toolbar. Type the initiator's email address in the To text box, type the message, and click Send.

- Choose File > Attach To Email, type the initiator's email address, and click Send.
- Click the Send Comments button in the Comments & Markups toolbar, type the address for the initiator in the To text box, and click Send.

***Note:*** *If the PDF exceeds the 5 MB file-size limit, you're prompted to send your comments in a smaller Forms Data Format (FDF) file, which the initiator can import. To adjust the limit, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), select Reviewing, and enter the new value for Send Comments As FDF For Files Greater Than [#] MB.*

## Publish comments from other reviewers

When you participate in a review, you may receive comments from other reviewers. If a reviewer can't access the comment server, they may send you their comments. If you solicited feedback from individuals who weren't initially invited to the review, they may return a copy of the review PDF to you with their comments. By taking ownership of the comments, you can share them with everyone in the review.

***Note:*** *If you publish comments from a reviewer who later gains access to the comments server, those comments may appear in the PDF in duplicate.*

**1** Open the PDF that contains comments.

**2** Do one of the following:

- Click OK when asked if you want to publish comments for this reviewer. The published comments appear in the PDF. Your name appears in the title bar and the author's name appears in the body of the comments, preceded by the text "On behalf of."
- Click Yes when asked if you want to merge comments, or click Merge Comments in the document message bar and then click Send Comments. Add email addresses for other reviewers, as needed, and then click Send.
- Choose Comments > Import Comments, and then click Send Comments. Add email addresses for other reviewers, as needed, and then click Send.

Only new or edited comments are published or sent.

## Rejoin a review

Use the Review Tracker to reopen PDFs in an active review. If you received a PDF attachment with an email message and didn't save it the first time you opened it, reopen the PDF in your email application. Only PDFs that you've saved appear in the Review Tracker.

**1** Choose Comments > Review Tracker.

**2** In the Review Tracker, double-click the PDF.

In shared reviews, the Welcome Back To Shared Review window shows the number of new comments that were published since the last time you opened the PDF. Click OK to close this window.

**3** Add new comments or edit existing comments. If you need to delete a comment, select it, and press Delete.

Deleted comments are removed from the online PDF the next time comments are synchronized or the browser window is refreshed. If you delete comments that you sent in an earlier email message, they aren't deleted in the initiator's document.

**4** Submit your new comments by doing one of the following:

- Click Publish Comments in the document message bar.
- Click Send Comments or Send And Receive Comments in the Comment & Markup toolbar.

Only new or edited comments are published or sent.

### See also

"Save the PDF with comments" on page 156

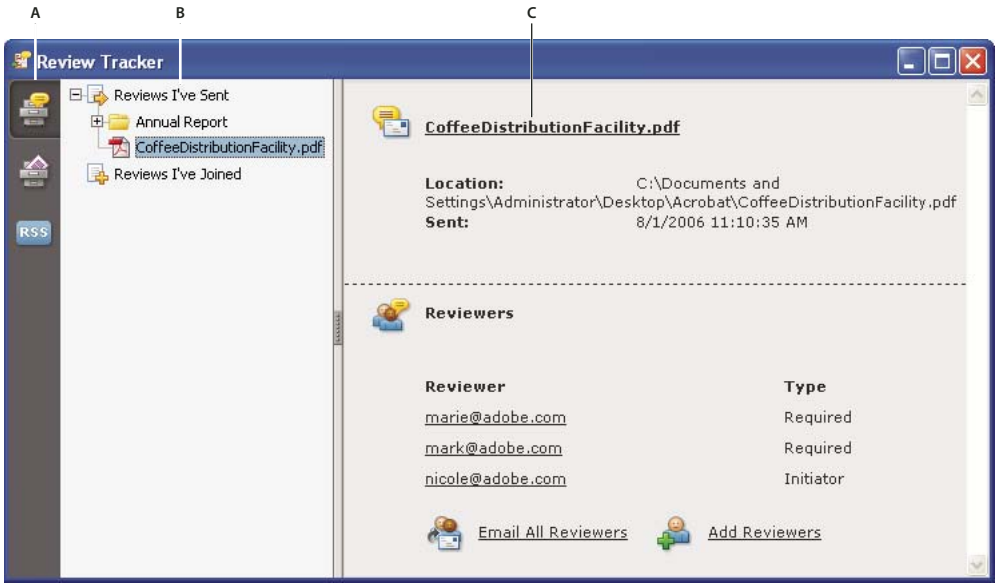
# Tracking PDF reviews

## Review Tracker overview

You can use the Review Tracker to manage your document reviews. From this window, you can see who's joined a shared review and how many comments they've published. You can also rejoin a review, access comment servers used in reviews, and email participants.

The Review Tracker includes links to all PDF documents in managed reviews. Each link lists the date and time the PDF was sent and the list of invited reviewers. Links to shared PDFs provide additional information, including the deadline (if set) and the number of comments submitted per reviewer. Deleting a link in the Review Tracker doesn't delete the PDF file.

In addition to the Review Tracker panel, the Review Tracker includes two other panels where you can manage forms and web broadcast subscriptions (known as *RSS feeds*). You can access these panels by clicking the Forms button or the Subscriptions button on the left side of the window.




*Review Tracker*
***A.*** *Review Tracker icon* ***B.*** *Reviews you initiated or received* ***C.*** *Information for the selected review*

### Open the Review Tracker

❖ Do one of the following:

- Choose Comments > Review Tracker.
- Click the Review & Comment button in the Task toolbar, and choose Review Tracker.

*If you're participating in a shared review, you can open the Review Tracker by clicking the Status button menu in the document message bar of the shared PDF.*

## Track reviewed PDFs

**1** Choose Comments > Review Tracker.

**2** Expand the appropriate folder:

**Reviews I've Sent** Lists PDFs in reviews that you initiated.

**Reviews I've Joined** Contains PDFs in reviews that you've received. PDFs appear in this list only after you open them.

***Note:*** *PDFs listed in bold contain comments that you haven't yet read.*

**3** Select a PDF.

Information specific to the selected PDF review appears on the right. Shared reviews open a summary page that lists reviewers who have joined the review and the number of new comments.

## Save the PDF with comments

You can save a copy of the review PDF that contains all the comments that reviewers have published or that you've imported (merged).

If the PDF is in a shared review, you can save an archive copy. The copy is no longer connected to the shared review, and you can edit both content and comments in it.

*If you want to create a copy of a shared PDF to distribute to others, use the Save As command. The resulting file will include all comments that were published up to that point, and it can be moved, copied, or renamed without affecting its connection to the review or to the comment server.*

❖ To save a copy of a review PDF with all the comments, open the file, and then do one of the following:

- For a shared review, choose File > Save As Archive Copy, or click the Status button in the document message bar and choose Save As Archive Copy.
- For an email-based review, choose File > Save As to save a new copy of the PDF. This most recently saved version is now the tracked PDF. The old version is the archive copy.
- For a browser-based review, use the Save And Work Offline button in the Comment & Review toolbar to save a copy of the PDF with all the comments to the local hard drive.

## Check server status

Check the server status in a shared PDF or in the Review Tracker to determine if you can connect to the comment server.

### Check status in a shared PDF

The Status button in the document message bar indicates whether the last attempt to connect to the comment server was successful.

**1** Open the shared PDF.

**2** In the upper-right corner of the document, the Status button displays either the last attempt successful icon, the last attempt unsuccessful icon, or the attempting to connect icon.

### Check status in the Review Tracker

1 Choose Comments > Review Tracker.

2 On the left, click the plus sign (+) next to Review Servers to expand the list.

The green icon next to the server name indicates that the last synchronization attempt was successful. The red icon indicates that the last synchronization attempt was unsuccessful. The server may be disconnected from the network, it may have problems writing data to the disk, or it may have some other problem. Contact your network administrator for help.

## Update your profile

Your comments identify you as the author by displaying your name—the name you provided when you joined or started a review, or your system login. You can change the author name and other profile information at any time. If you do, your updated profile appears only in new comments; existing comments aren't affected.

### Update your review profile

*You can also update your review profile from the Welcome Back To Review window that appears when you rejoin a shared review.*

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).

2 To change your author name, select Commenting from the list on the left, and deselect Always Use Log-In Name For Author Name.

3 Select Identity from the list on the left.

4 Edit your profile, making sure to include the email address that you'll use for reviews. Click OK.

### Update your profile for a shared review

1 Open the shared PDF.

2 In the Welcome screen that appears, click the Edit button for Reviewer Profile.

3 Edit your profile, making sure to include a valid email address, and click OK.

If you change the name in your profile, it will appear twice—in the list of invited participants, and in the list of uninvited participants.

## Subscribe to web broadcast services

You can use the Review Tracker as a news reader by subscribing to web content that uses the RSS (Really Simple Syndication) format, such as news feeds or music channels. RSS format is compatible with XML and RDF formats.

1 Do one of the following:

- Click the Subscriptions button RSS on the left side of the Review Tracker. Click the Subscribe button, enter a web address in the URL box, and then click OK.
- Click the link for an RSS service.

2 If a security warning prompts you to approve the link, click OK.

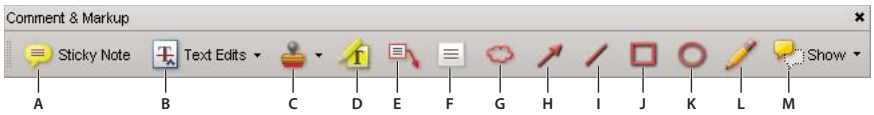
# Commenting

## Commenting and markup tools overview

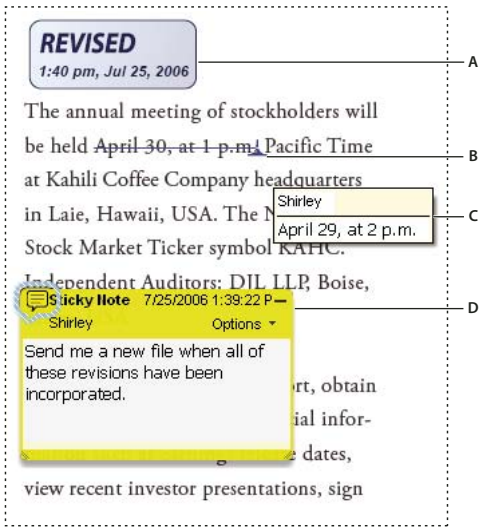
You use commenting and markup tools (View > Toolbars > Comment & Markup) to add *comments*. Comments are notes and drawings that communicate ideas or provide feedback for PDFs. You can type a text message using the Sticky Note tool, or you can use a drawing tool to add a line, circle, or other shape and then type a message in the associated pop-up note. Text-editing tools let you add editing marks to indicate changes you want in the source document. Most commenting and markup tools don't appear in the toolbar until you add them.

Most comments include two parts: the icon, or *markup*, that appears on the page, and the text message that appears in a pop-up note when you click or double-click the icon or place the pointer over the icon.

After you add a comment, it stays selected until you click elsewhere on the page. A selected comment is highlighted by a blue halo to help you find the markup on the page. A wireframe with selection handles appears so you can adjust the size and shape.




*Comment & Markup toolbar*
***A.** Sticky Note tool **B.** Text Edits tool **C.** Stamp tool and menu **D.** Highlight Text tool **E.** Callout tool **F.** Text Box tool **G.** Cloud tool **H.** Arrow tool **I.** Line tool **J.** Rectangle tool **K.** Oval tool **L.** Pencil tool **M.** Show menu*




*Types of comments in a PDF*
***A.** Stamp **B.** Text edit **C.** Comment rollover (tool tip) **D.** Sticky note*

## See also

"Show and hide toolbar elements" on page 21

"Comment on 3D designs" on page 302

### Show the Comment & Markup toolbar

The Comment & Markup toolbar doesn't appear by default, except when you open a PDF in a managed review workflow.

❖ Do one of the following:

- Choose View > Toolbars > Comment & Markup.
- Choose Comments > Show Comment & Markup Toolbar.
- Choose Tools > Comment & Markup > Show Comment & Markup Toolbar.
- Click the Review & Comment button in the Task toolbar, and choose Show Comment & Markup Toolbar.

*To add or remove tools for this toolbar, right-click/Control-click the toolbar, and select the tool. Or, choose Tools > Customize Toolbars.*

### Select a commenting or markup tool

❖ Do one of the following:

- Select a tool from the Comment & Markup toolbar.
- Choose Tools > Comment & Markup > *[tool]*.
- Choose Comments > Comment & Markup Tools > *[tool]*.

***Note:*** *After you make an initial comment, the tool changes back to the Select tool so that you can move, resize, or edit your comment. (The Pencil, Highlight Text, and Line tools stay selected.)*

### Keep a commenting tool selected

You can add multiple comments without reselecting the tool.

1. Select the tool you want to use (but don't use it yet).
2. Choose View > Toolbars > Properties Bar.
3. Select Keep Tool Selected.

## Commenting preferences

Commenting preferences affect both the appearance of and the way you view comments and markups in PDFs.

***Note:*** *Because comments can be placed anywhere within the document frame, you may need to scroll or zoom out to see comments that are located off the page.*

To set commenting preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then select Commenting on the left side.

**Font, Font Size** In Windows, you can determine the font and the size of text in pop-up notes. In Mac OS, you can select only Large, Medium, or Small settings for the font. This setting applies to all new and existing comments.

**Pop-up Opacity** Determines the opacity of comment pop-up notes in values from 1-100. When a pop-up note is open but not selected, an opacity value of 100 makes the note opaque, while lower values make it more transparent.

**Enable Text Indicators And Tooltips** Shows a tool tip containing the author name, comment status, and two lines of the text when you place the pointer over a comment that includes a pop-up note. Selected by default.

**Print Notes And Pop-ups** Specifies that pop-up notes associated with comments, and icons for note, audio, and file attachments, print exactly as they appear on the page.

Instead of selecting this option, you can print comment text in various layouts by choosing File > Print, and clicking Summarize Comments.

**Show Lines Connecting Comment Markups To Their Pop-ups On Mouse Rollover** When you place the pointer over a comment markup (such as a highlight or a note icon), the shaded connector line between the comment and the open pop-up note appears. Selected by default.

**Ensure That Pop-ups Are Visible As The Document Is Scrolled** As you scroll a PDF, the pop-up notes on a given page shift to stay in view within the document pane. Selected by default.

**Automatically Open Comment Pop-ups For Comments Other Than Notes** A pop-up note appears when you create a new comment using a drawing tool, the Stamp tool, or the Pencil tool.

**Hide Comment Pop-ups When Comments List Is Open** Helps reduce screen clutter when a page includes many comments. Selected by default.

**Automatically Open Pop-ups On Mouse Rollover** When you place the pointer over a comment of any type, including drawing markups and stamps, the pop-up note opens.

**Always Use Log-in Name For Author Name** Determines which name appears in the pop-up note you create. If this option is selected, the Login Name in the Identity panel of the Preferences dialog box is used. If this option isn't selected, the default name you specify for Author in a comment properties dialog box is used. Selected by default.

**Create New Pop-ups Aligned To The Edge Of The Document** Aligns pop-up notes with the right side of the document window, regardless of where the comment markup (such as a note icon or highlighting comment) is added. If this option is deselected, the pop-up note appears next to the comment markup. Selected by default.

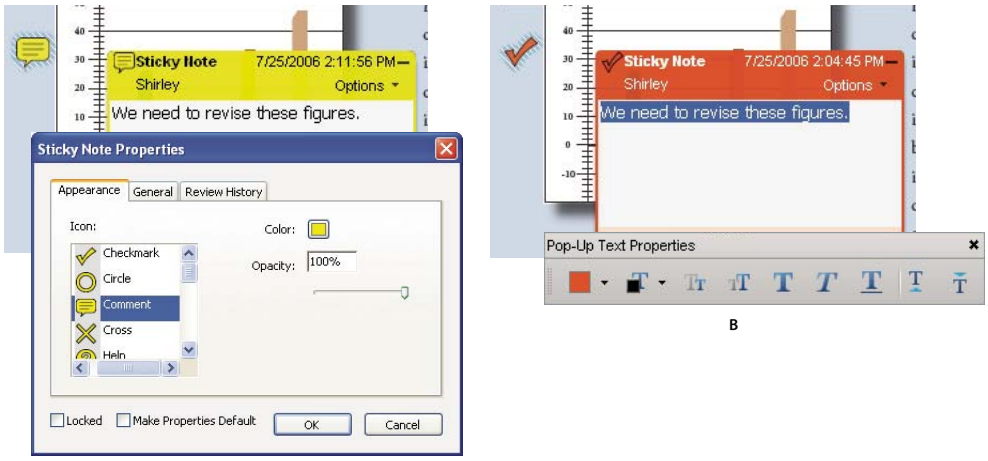
**Copy Encircled Text Into Drawing Comment Pop-Ups** Copies text that you circle using the drawing tools in the pop-up note associated with the drawing markup.

**Copy Selected Text Into Highlight, Cross-Out, And Underline Comment Pop-ups** Copies selected text to the pop-up note associated with text editing comments, such as those created by the Highlight Text tool.

## Change the look of your comments

You can change the color and appearance of comments or markups before or after you create them. You can set the new look as the default appearance for that tool.

***Note:*** *If you want to change how your name appears in comments, open the Commenting preferences—choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and choose Commenting on the left—and deselect Always Use Log-in Name For Author Name in the Commenting panel of the Preferences dialog box.*




*Properties toolbar*
***A.*** *With note icon selected* ***B.*** *With pop-up text selected*

### Change a comment's look and set it as the default

**1** After you create a comment, do one of the following:

- Choose Properties from the Options menu of the pop-up note.
- Right-click/Control-click the markup, and then choose Properties.

**2** In the Properties dialog box, do any of the following, and then click Close:

- Click the Appearance tab to change such options as the color and type of icon used. The type of comment selected determines which options are available.
- Click the General tab to change the author's name and subject of the comment.
- Click the Review History tab to see the history of changes people have made to the status of a comment during a review.
- Select Locked at the bottom of the Properties dialog box to prevent the comment from being edited or deleted.
- Select Make Current Properties Default at the bottom of the Properties dialog box to apply these properties to all subsequent comments of this type that you make.

### Set the default look for a tool

**1** In the Comment & Markup toolbar, right-click/Control-click the tool you want to use, and choose Tool Default Properties.

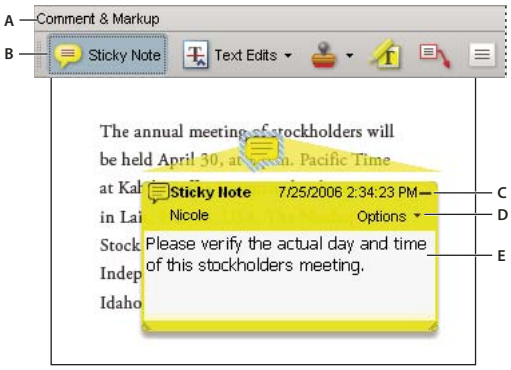
***Note:*** *If the tool you want doesn't appear in the Comment & Markup toolbar, right-click/Control-click the toolbar, and select the tool.*

**2** Set the properties as desired, and click OK.

All comments you create using this tool will display the properties you set. Existing comments aren't affected, nor is the appearance of text in pop-up notes.

## Add a sticky note

The most common type of comment is the sticky note. A sticky note has a note icon that appears on the page and a pop-up note for your text message. You can add a sticky note anywhere on the page or in the document area.




*Use the Sticky Note tool to add a text message in a pop-up note.*
***A.** Comment & Markup toolbar **B.** Sticky Note tool **C.** Close button **D.** Options menu **E.** Text message*

### Add a sticky note comment

**1** Do one of the following:

- Select the Sticky Note tool in the Comment & Markup toolbar, and either click where you want to place the note, or drag to create a custom-sized note.
- Choose Comments > Add Sticky Note.

**2** Type text in the pop-up note. You can also use the Select tool to copy and paste text from a PDF into the note.

***Note:** If you close the pop-up note, your text remains.*

### Edit a sticky note comment

**1** Click or double-click the note icon.

**2** Make changes, as needed:

- To resize the pop-up note, drag the lower-left or lower-right corner.
- To change the text formatting, choose View > Toolbars > Properties Bar, select the text, and then select the property you want in the toolbar. Or, select the text, right-click/Control-click, and choose a text style option.

*Use the Commenting panel in the Preferences dialog box to change the font size, default pop-up behavior, and other settings for creating and viewing comments.*

When you're finished, click the minimize button in the upper-right corner of the pop-up note, or click outside the pop-up note.

### Delete a sticky note

**1** Select the Sticky Note tool, the Hand tool, or the Select tool.

**2** Select the note icon, and press Delete.

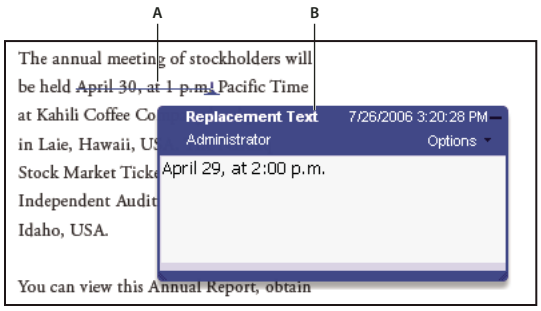
Alternatively, double-click the note icon and choose Delete from the Options menu of the pop-up note.

## Mark up text with edits

You can use text edit comments in a PDF to indicate where text should be edited in the source file. Text edit comments do not change the actual text in the PDF. Instead, they indicate which text should be deleted, inserted, or replaced in the source file from which the PDF was created.

You can use the Select tool or the Text Edits tool to add most types of text edits. Shortly after you click or select text with the Text Edits tool, an icon appears. If you right-click this icon, a menu of text editing options appears.

In Windows, you can export text edits directly to the Microsoft Word document that the PDF is based on to revise the source document. To use this feature, you must use PDFMaker in Word to create the PDF. Before you export your text edits, make sure that insertion comments use the exact text, including spaces and paragraph returns, that you want to add. If you add extra instructional words (such as "Add the following:"), these words will have to be deleted manually from the Word document.




*Replace Text option*
***A.*** *Selected text is struck out.* ***B.*** *New text is added to a linked pop-up note.*

## See also

"Export comments to Word (Windows)" on page 178

### Replace text

**1** Use the Select tool, or select the Text Edits tool from the Comment & Markup toolbar.

*If you don't want the Indicating Text Edits dialog box to appear each time you select the Text Edits tool, select Don't Show Again in the dialog box, and then click OK.*

**2** Select the text you want to replace.

**3** Press Enter or Return, or choose Replace Text from the menu that appears, and then do one of the following:

- Type the text to be inserted or added. This text appears in a pop-up note. Any selected text is crossed out. The insertion caret appears.
- To indicate that a new paragraph should be added, close the pop-up note without adding text. The paragraph insertion caret ¶ appears.

### Add a note to a text edit

**1** Use the Select tool or the Text Edits tool from the Comment & Markup toolbar.

**2** Select Add Note At Cursor from the menu that appears.

**3** Type your note in the pop-up note.

***Note:*** *If you export your text edits to Microsoft Word, any text you add to the pop-up note that's associated with a text edit is imported (into Word) with the text edit.*

### Show inserted text

**1** Select the Text Edits tool from the Comment & Markup toolbar.

**2** Click between the words or characters where you want to insert text.

**3** Do any of the following:

- Type the text you want to insert.
- To indicate that a new paragraph should be added, press Enter or Return, and then close the pop-up note without adding text. The paragraph insertion caret appears.
- To indicate that a space should be added, press the spacebar, and then close the pop-up note without adding text. The space insertion caret appears.

*You can also indicate text edits by using the Select tool to select text, right-click/Control-click the selected text, and then choose Replace Text (Comment).*

#### Delete inserted text

**1** In the Comment & Markup toolbar, choose the Text Edits tool.

**2** Select the text, and then press Backspace or Delete, or choose Cross-Out Text from the menu.

#### Delete text markups

*If markup comments are stacked, delete the comments in the Comments list: Click the Comments button in the navigation pane to open the Comments list, select the comment, and press Delete.*

❖ Do one of the following:

- Select the markup and press Delete.
- Right-click/Control-click the markup, such as the highlighting or cross-out, and then choose Delete.

## Highlight, cross out, or underline text

You can use the Highlight Text tool, Cross-Out Text tool, and the Underline Text tool to add comments by themselves or in conjunction with notes. The Cross-Out Text tool and the Underline Text tool don't appear in the Comment & Markup toolbar, by default.

You can add a highlight with a note or you can cross out text by selecting the text using the Select tool or Text Edits tool, and then choosing that option from the menu that appears. However, if you're marking up a lot of text, the specialized tools are faster and easier to use.

**1** Choose Tools > Comment & Markups, and select the Highlight Text tool, the Cross-Out Text tool, or the Underline Text tool.

***Note:*** *If you want to apply more than one comment using the Cross-Out Text tool or the Underline Text tool, choose View > Toolbars > Properties Bar, and select Keep Tool Selected in the Properties toolbar after you select the tool. The Highlight Text tool stays selected after you make the first comment.*

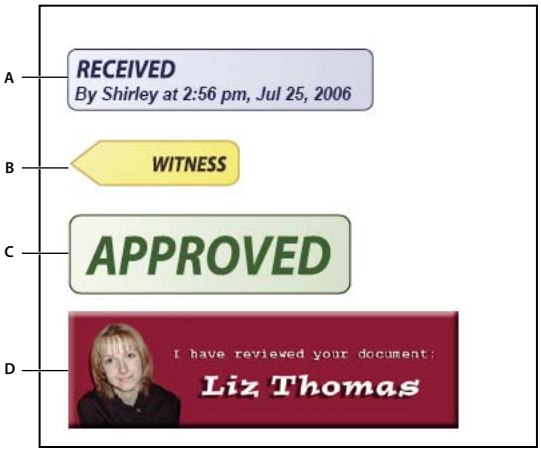
**2** Drag from the beginning of the text you want to mark up. Ctrl-drag (Windows) or Option-drag (Mac OS) to mark up a rectangular area of text. This is especially useful when marking up text in a column.

**3** (Optional) To add a note, double-click the markup to add text in a pop-up note.

## Stamp a document

You apply a stamp to a PDF in much the same way you apply a rubber stamp to a paper document. You can choose from a list of predefined stamps, or you can create your own stamps. Dynamic stamps obtain information from your system and from the Identity panel of the Preferences dialog box, allowing you to indicate name, date, and time information on the stamp.

The Stamp tool appears in the Comment & Markup toolbar, by default.




*Stamp tool categories*
***A.** Dynamic stamp **B.** Sign Here stamp **C.** Standard Business stamp **D.** Custom stamp*

### Open the Stamps palette

❖ Do one of the following:

- Choose Tools > Comment & Markup > Stamps > Show Stamps Palette.
- In the Comment & Markup toolbar, click the arrow next to the Stamp tool and choose Show Stamps Palette.

### Apply a stamp

**1** Select a stamp by doing one of the following:

- Click the Stamp tool. The mostly recently used stamp is selected.
- In the Stamps Palette, choose a category from the menu, and then select a stamp.

**2** Click the document page where you want to place the stamp, or drag a rectangle to define the size and placement of the stamp.

**3** If you haven't provided a name in the Identity preferences, the Identity Setup dialog box prompts you to do so.

### Change a stamp's location or appearance

❖ Using the Select tool or the Hand tool, do any of the following:

- To move a stamp, drag it to a new location.
- To resize a stamp, click it, and then drag a corner handle.
- To rotate a stamp, click it, move the pointer over the handle at the top of the stamp, and drag when the rotate stamp icon appears.
- To delete a stamp, right-click/Control-click the stamp and choose Delete.
- To change the stamp's opacity or the color of its pop-up note, right-click/Control-click the stamp, and choose Properties. In the Appearance tab, set the opacity or color.

### Move a stamp to the favorites list

**1** Using the Select tool or the Hand tool, select a stamp markup on the page.

**2** In the Comment & Markup toolbar, click the Stamp tool and choose Favorites > Add Current Stamp To Favorites.

## Create a custom stamp

You can create custom stamps from a number of different formats, including (but not limited to) PDF, JPEG, bitmap, Adobe® Illustrator® (AI), Adobe® Photoshop® (PSD), and Autodesk AutoCAD (DWT, DWG) files.

***Note:*** *To add an image to a PDF one time only, simply paste the image into the document. Pasted images have the same characteristics as other stamp comments; each includes a pop-up note and editable properties.*

1 Choose Tools > Comment & Markup > Stamps > Show Stamps Palette.

2 Click Import, select the file you want to use, and then click Select.

3 If the file has more than one page, scroll to the page you want, and then click OK.

4 Choose a category from the menu or type a new category name, name the custom stamp, and then click OK.

### Change the name or category for a custom stamp

1 Choose Tools > Comment & Markup > Stamps > Show Stamps Palette.

2 Choose the stamp category, right-click/Control-click the stamp, and choose Edit.

3 Edit the category or name of the stamp, or replace the image, and then click OK.

### Delete a custom stamp

You can delete only the custom stamps that you created, not the predefined stamps. When you delete a stamp, the stamp is removed from the Stamp tool menu, but the stamp file isn't deleted.

1 Choose Tools > Comment & Markup > Stamps > Show Stamps Palette.

2 Choose the stamp category from the menu, right-click/Control-click the custom stamp, and choose Delete.

3 If you haven't provided a name in the Identity preferences, the Identity Setup dialog box prompts you to do so.

### Delete a custom stamp category

1 Choose Tools > Comment & Markup > Stamps > Manage Stamps.

2 Select the category you want to delete, and then press Delete.

***Note:*** *Deleting all stamps in a custom stamp category deletes the custom stamp category.*

## Add a line, arrow, or shape

When selecting a drawing tool, consider the effect you want.

1 Choose Tools > Comment & Markup, and select a drawing tool:

- The Rectangle tool, the Oval tool, the Arrow tool, and the Line tool let you create simple shapes.
- The Cloud tool and Polygon tool create closed shapes with multiple segments. The Polygon Line tool creates open shapes with multiple segments.
- The Pencil tool creates free-form drawings, and the Pencil Eraser tool removes the pencil markups.

*To specify the line width, color, and other properties before you draw, right-click/Control-click the drawing tool, choose Properties, and set the desired options in the Properties dialog box.*

2 Draw in the PDF:

- To create a cloud or polygon shape, click to create the start point, move the pointer, and click to create each segment. To finish drawing the shape, click the start point, or right-click/Control-click and choose Complete from the menu. Double-click to end a polygon line.

- To draw a line, arrow, or rectangle, either drag across the area where you want the markup to appear, or click twice: once to create the start point and once to create the end point.
- To draw a square or circle, or to draw a line that's horizontal, vertical, or at a 45° angle, press Shift while you draw.
- To draw free-form lines using the Pencil tool, drag where you want to begin drawing. You can release the mouse button, move the pointer to a new location, and continue drawing. To erase parts of the drawing, select the Pencil Eraser tool and drag across the areas of the drawing that you want to remove.

**3** To edit or resize the markup, select it and drag one of the handles to make your adjustments.

**4** To add a pop-up note to the markup, select the Hand tool, and double-click the markup.

**5** (Optional) Click the close button in the pop-up note. A note icon appears to the right of the markup to indicate the presence of text in the pop-up note.

***Note:*** *To delete a drawing markup, select it and press Delete.*

## Group and ungroup markups

You can group two or more markups so that your comments function as a single comment. You might group markups temporarily to move them to a new location or to modify their properties rather than editing each one individually. Grouping also helps to distinguish your markups from other reviewers' markups in a document review.

***Note:*** *You cannot group text edit markups.*

### Group markups

**1** Using the Select tool or the Hand tool, select a markup.

**2** Ctrl-click/Command-click to select the markups you want to group.

**3** Right-click/Control-click within the selection, and choose Group.

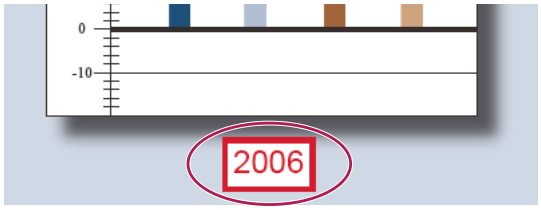
### Ungroup markups

❖ Right-click/Control-click the grouped selection, and choose Ungroup.

## Add comments in a text box or callout

You can use the Text Box tool to create a box that contains text. You can position it anywhere on the page and adjust it to any size. A text box remains visible on the document page; it doesn't close like a pop-up note.

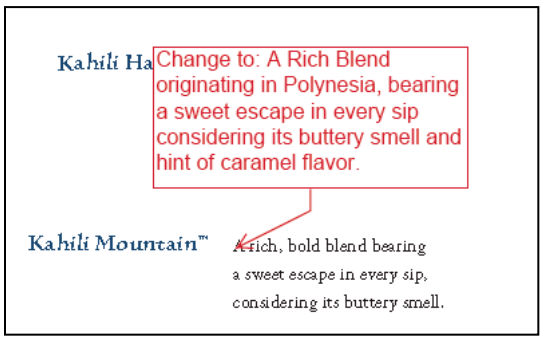
Another way to add a text box is simply to paste copied text into the PDF. Text font and size are based on the system default settings.




***Note:*** *You can add comments to Japanese, Chinese, and Korean text with the Text Box tool, but you must have the Asian-language resource files installed. Text boxes allow for horizontal text only.*

You can use the Callout tool to create a callout text box. Callout text boxes are especially useful when you want to single out—but not obscure—a particular area of a document. Callout text boxes have three parts: a text box, a knee line, and an end-point line. You can resize each part by dragging a handle. The knee line can be resized in one direction only; horizontal knee lines can be resized horizontally only; vertical knee lines can be resized vertically only. The text box expands vertically as you type so that all text remains visible.

You can move the text box bar itself or together with the end-point line. The text box moves around a stationary anchor point—the arrow on the end-point line—which is created when you first click in the PDF. You can modify the color and appearance of the text box and add arrows or leaders to the end-point line.




### Add a text box

1 Choose Tools > Comment & Markup > Text Box Tool .

2 Click in the PDF.

3 Choose View > Toolbars > Properties Bar, and set the color, alignment, and font attributes for the text.

4 Type the text.

Text wraps automatically when it reaches the right edge of the box.

5 (Optional) To make further changes to the text box:

- Using the Select tool or the Text Box tool, click an edge of the text box to select it, and then drag a corner to resize it. Use the Properties toolbar to change the border and fill options.
- Double-click the text box to edit the text or change the text attributes. Drag across text to select it, and then select options from the Properties toolbar.

6 To delete the text box, right-click/Control-click the text box, and then choose Delete.

*You can also paste a block of text by selecting and copying the text in any application, selecting the Hand tool in Acrobat, and choosing Edit > Paste.*

### Add a callout

1 Choose Tools > Comment & Markup > Callout tool .

2 Click once to set the location of the end point, and click again to set the location of the text box.

3 Choose View > Toolbars > Properties Bar, and select the color, alignment, and font attributes for the text.

4 Type the text.

Text wraps automatically when it reaches the right edge of the box.

**5** (Optional) To make further changes to the text box:

- To resize the callout, select it and drag any of the handles that appear.
- To move the text box, click inside the box and drag it.
- To move the entire callout, click either the end-point line or an edge of the text box, and drag it.
- To change the color, opacity, or line characteristics, use the Select tool to right-click/Control-click the callout, choose Properties, and select the options you want.

## Add an audio comment

You can use the Record Audio Comment tool to add a prerecorded WAV or AIFF file as a comment or to record and place an audio comment in a document. Audio attachments appear in the Comments list and can be played back on any platform. However, the appropriate hardware and software for playing audio files must be installed.

The Record Audio Comment tool doesn't not appear in the Comment & Markup toolbar by default. However, you can add it by choosing Tools > Customize Toolbars.

### See also

"Change the look of your comments" on page 160

#### Add a prerecorded audio comment

**1** Choose Tools > Comment & Markup > Record Audio Comment tool and then click in the PDF where you want to place the audio comment.

**2** Click Browse (Windows) or Choose (Mac OS), and select the audio file you want to add.

**3** (Optional) To hear the audio comment, click the Play button . When you're finished, click Stop and then click OK.

**4** Specify options in the Properties dialog box, and then click OK.

#### Record an audio comment

**1** Choose Tools > Comment & Markup > Record Audio Comment tool and then click in the PDF where you want to place the audio comment.

**2** In the dialog box that appears, click the Record button and then speak into the microphone. When you've finished recording, click the Stop button ■, and then click OK.

**3** Specify options in the Properties dialog box, and then click OK.

## Add comments in a file attachment

Use the Attach File As Comment tool to embed a file at a selected location in a PDF, so that the reader can open it for viewing. By adding attachments as a comment, you can reference longer documents that can't easily be pasted into a pop-up note or text box. If you move the PDF to a new location, the embedded file automatically goes with it. To view an attachment, the reader must have an application installed that can open the attachment.

***Important:*** *Be sure to use the Attach A File As A Comment tool in the Comment & Markup toolbar when attaching files for a document review. Document-level file attachments that you attach using the paper clip icon (Attach A File tool) from the File toolbar aren't tracked with other comments in a review workflow and may cause your attached comments to be lost.*

**1** Choose Tools > Comment & Markup > Attach A File As A Comment Tool .

**2** Click in the PDF where you want to place the attachment.

**3** Select the file that you want to attach, and then click Select. If you're attaching a PDF, you can highlight areas of interest in the file using comments.

**4** In the Properties dialog box, select the settings for the file icon that appears in the PDF, and then click Close.

The comment attachment appears in the Attachments tab with a page number indicating its location.

***Note:*** *To delete the attachment, right-click/Control-click the attached comment icon, and choose Delete.*

### Paste images as comments

You can use the Paste Clipboard Image As Stamp tool to add images to a PDF. You can copy most image formats from drawing and image-editing applications, such as Adobe Photoshop and Adobe Illustrator. If you want to add the image to PDFs repeatedly, create a custom stamp of the image.

***Note:*** *The Paste Clipboard Image As Stamp tool isn't available until you copy an image.*

**1** Copy an image by doing one of the following:

- In Acrobat, choose Tools > Select & Zoom > Snapshot Tool , and select an image from a PDF.
- In another application, select an image and choose Edit > Copy.

**2** Open a PDF.

**3** Choose Tools > Comment & Markup > Stamps > Paste Clipboard Image As Stamp Tool.

**4** Click in the PDF where you want the image to appear.

**5** Do any of the following:

- To move the image, drag it.
- To resize the image, select it and then drag one of its handles. Press the Shift key when resizing the image to maintain the original proportions.
- To change the image properties, right-click/Control-click it and choose Properties.
- To delete the image, right-click/Control-click it and choose Delete.

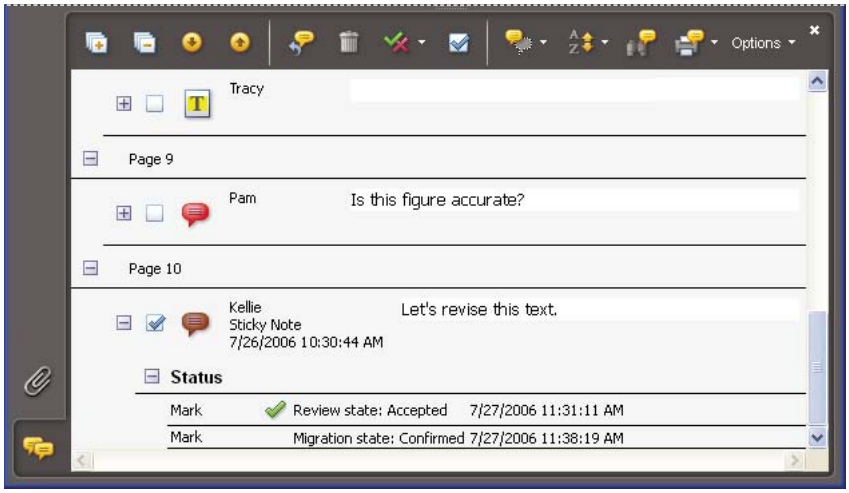
### See also

"Copy images" on page 139

# Managing comments

### View comments

The Comments list displays all the comments in a PDF, and it provides a toolbar with common options, such as sorting, filtering, deleting, and replying to comments.




*The Comments button in the navigation pane opens the Comments list.*

### Open the Comments list

**1** Do one of the following:

- Click the Comments button in the navigation pane.
- Choose Comments > Show Comments List.
- Click the Review & Comment button in the Task toolbar and choose Show Comments List.

**2** Using the options at the top of the Comments list, do any of the following:

- Expand or collapse the comments. Click Expand All or Collapse All in the Comments List toolbar. To expand or collapse individual comments, click the plus and minus signs next to the comment.
- Browse through the comments. Click a comment in the list, or click the Next button or the Previous button to go to the next or previous comment. (These buttons are unavailable if no comment is selected.) The page on which the selected comment is located appears in the document pane, and the selected comment scrolls into view. To go to the page where another comment is located, simply click the comment in the list.

### Sort comments

You can sort comments in the Comments list by author, page, type, date, color, checked state, or status by person. In a thread of replies, only the first message is sorted, and the reply messages are sorted in the same category as the first message in the thread.

**1** Click the Comments button in the navigation pane.

**2** Choose an option from the Sort By menu in the Comments list.

### Show or hide comments

You can hide or show comments based on type, reviewer (author), status, or checked state. Hiding comments is also called filtering. Filtering affects the appearance of comments in both the document window and the Comments list. When you print or summarize comments, you can specify whether hidden comments are printed or summarized. When you hide a note comment that has been replied to, all other replies in the thread are hidden as well.

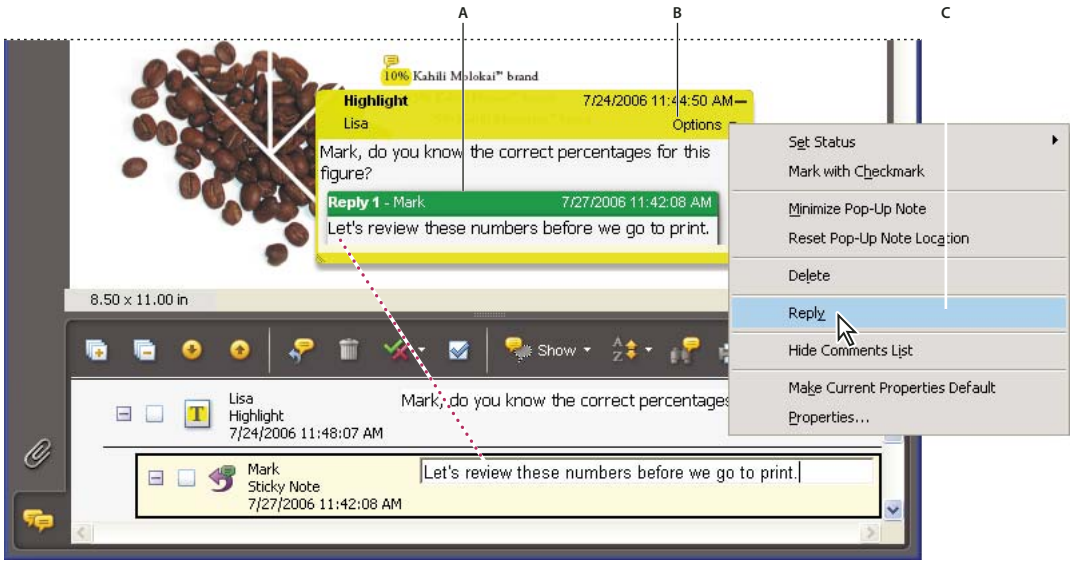
***Note:*** *In an email-based review, hidden comments aren't included when you send the comments to the initiator.*

❖ From the Show menu in the Comments list, do one of the following:

- To show all comments, choose Show All Comments.
- To hide all comments, choose Hide All Comments.
- To filter comments, choose the categories that you want to appear. For example, if you want only note comments that you haven't checked to appear, choose Show By Type > Notes so that only the note comments appear, and then choose Show By Checked State > Unchecked so that only unchecked note comments appear.
- To reverse a filter, choose the All command for hidden categories. For example, if you filtered comments so that only those by a certain reviewer appear, choose Show > Show By Reviewer > All Reviewers.

## Reply to comments

Replies to comments are especially useful in shared and browser-based reviews, when participants can read each other's comments. They can also be used by review initiators to let reviewers know how their suggestions are being implemented. When one or more reviewers reply to a comment, the set of replies is called a *thread*. All replies in a thread appear in the pop-up note and in the Comments list. Replies are indented below the original comment. The number of replies that a comment has received appears in a box when you place the pointer over the comment.




*Replies appear directly below the comment, in the pop-up note and in the Comments list.*
***A.*** *Reply heading* ***B.*** *Options menu* ***C.*** *Reply option in Options menu*

### Reply in the pop-up note

1. Open the pop-up note for the comment.
2. Choose Reply from the Options menu.
3. Type your reply in the box that appears.

### Reply in the Comments list

1. Click the Comments button in the navigation pane.
2. Select a comment in the Comments list.

**3** Click the Reply button .

**4** Type your reply in the box that appears.

#### Delete a reply

If you delete a comment that's been replied to, only the comment is deleted. Any replies remain in the PDF, but they are no longer part of a thread. These replies may be difficult to view in the PDF because they are stacked. You may want to view them in the Comments list.

❖ Do one of the following:

- In the pop-up note, right-click/Control-click the reply and choose Delete This Reply.
- Select the reply in the Comments list and then click the trash icon in the Comments List toolbar.

## Set a status or check mark

Statuses and check marks are useful for keeping track of comments that you've read or that require further action. In Windows, you can use a status or a check mark to indicate which comments you want to export to a Word document. By setting the review status, you can show or hide a group of comments and let review participants know how you are going to handle the comment. Once the review status is set, you cannot remove the review status display from the comment in the Comments list, even if you change the review status to None. Check marks are for your personal use and do not appear when others view the PDF unless you change the status of comments.

#### Set a status

**1** Select the comment in the Comments list, click the Set Status button , and choose an option.

The review status appears in the comment along with the name of who set the review status. If another reviewer sets the review status for that comment, both reviewers' names and review statuses appear in the Comments list.

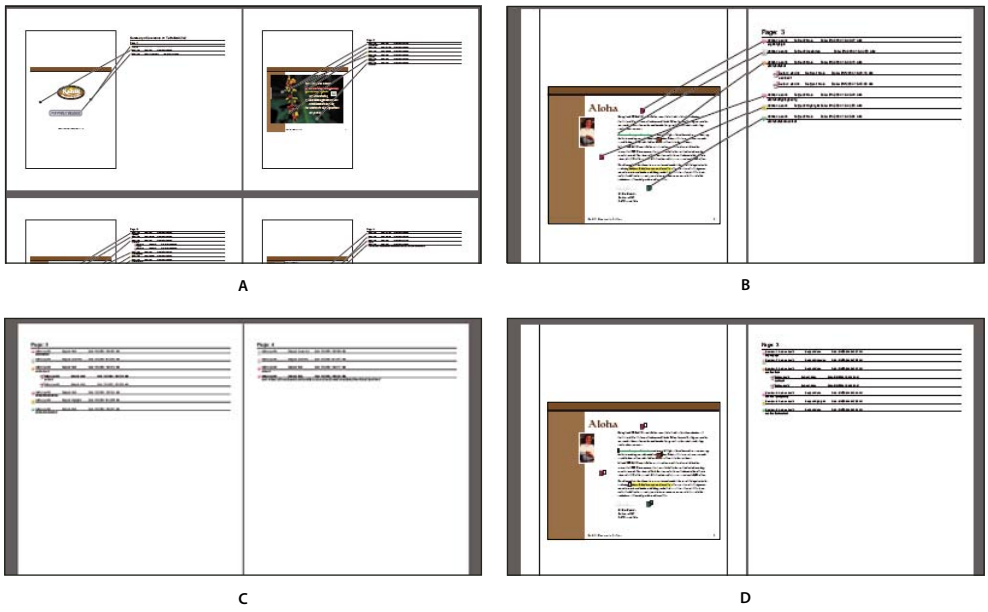
**2** To view a comment's history of changes, right-click/Control-click the note icon, markup, or title bar of a pop-up note, and then choose Properties. Click the Review History tab.

#### Flag comments with a check mark

❖ In the Comments list, click the check box next to a comment so that the check mark icon appears.

## Print a comment summary

Summarizing comments is a convenient way to get a synopsis of all the comments associated with a PDF. When you summarize comments, you can either create a new PDF with comments that you can print, or you can print the summary directly. The summary is neither associated with nor linked to the PDF that the comments are derived from.




*Page layout options for comment summaries*
***A.*** *Document and comments with connector lines on single page* ***B.*** *Document and comments with connector lines on separate pages*
***C.*** *Comments only* ***D.*** *Document and comments with sequence numbers*

By default, Acrobat prints PDFs with any stamps that were applied. For the greatest control over how comments are printed, choose Comments > Print With Comments Summary.

**1** Filter the comments to show only those you want in the summary. (In the Comments list, click the Show button and choose the categories of comments you want to show.)

**2** For the greatest control over how comments are printed, choose Comments > Print With Comments Summary. Alternatively, to create a separate PDF of the comments, do one of the following:

- Choose Comments > Summarize Comments.
- Choose Summarize Comments from the Options menu in the Comments list.

**3** In the Summarize Options dialog box, do the following, and then click OK:

- Choose a layout for the document and comments. The layout determines available options.
- Choose how to sort the comments.
- Specify a page range and choose whether to include pages without comments.
- Select whether you want all comments to appear in the summary or only the comments that currently appear.

**4** Do one of the following:

- Click Print Comment Summary, and click OK. (This option appears only if you chose the Print With Comments Summary command.)
- Click Create PDF Comment Summary.

*To print or summarize comments directly without opening the Summarize Options dialog box, click the Print Comments button in the Comments List toolbar, and choose Print Comments Summary or Create PDF Of Comments Summary.*

## Find a comment

Locate a comment in the Comments list by searching for a particular word or phrase.

1 Click the Comments button in the navigation pane to display the Comments list.

2 Click the Search Comments button in the Comments List toolbar.

3 In the Search window, specify the word or phrase you want to search for, and then click Search Comments.

### See also

"Search features overview" on page 281

## Delete comments

You cannot delete other reviewers' comments in a shared review or a browser-based review, nor can you delete locked comments. If you add comments to a PDF before you upload it to a remote server for review, you can't delete those comments.

*To delete all of the comments in a PDF, use the Examine Document feature. See "Examine a PDF for hidden content" on page 197.*

#### Delete a comment

❖ Do one of the following:

- Select the comment and press Delete.
- Right-click/Control-click the comment, and choose Delete.
- In the Comments list, select the comments you want to delete, and then click the trash icon .

***Note:*** *Before pressing the Delete key, make sure that the comment is selected.*

#### Unlock a comment

1 Right-click/Control-click the comment and choose Properties.

2 Deselect Locked, and then click Close.

## Spell-check comments

You can spell-check the text you add in note comments and form fields. However, you cannot spell-check the text in the underlying PDF. Unrecognized words appear underlined after you type them. You can edit these words in context, or you can open the Check Spelling dialog box. The comment in the document window is updated with your changes.

You can also spell-check alternative text descriptions that you add to form fields.

### See also

"Spell-check form entries" on page 189

#### Spell-check a single word

1 Open the pop-up note of a comment.

2 Select the word you want to check, and right-click/Control-click the selection.

**3** Select the correct word from the list of alternatives that appear at the top of the menu.

### Spell-check all text in comments

**1** Choose Edit > Check Spelling > In Comments, Fields, & Editable Text. If the PDF is open in a browser, make sure that the Edit toolbar is open, and click the Spell Check button .

**2** Click Start to begin the spell check. When a word that may be misspelled is found, it appears under Word Not Found. Suggested corrections appear under Suggestions.

**3** To change the word that may be misspelled, do one of the following:

- Edit the selected word. To undo your change, click Undo Edit. To accept your change, click Change.
- Double-click a suggested correction.
- Click Ignore if you don't want to change the word and want to continue with the check.
- Click Ignore All to ignore every instance of the word. Click Add to add the word to your personal dictionary.
- Select a suggested correction and then click Change. Click Change All to replace every instance of the unrecognized word with the suggested correction.

**4** Click Done.

### Specify a language dictionary

**1** Choose Edit > Check Spelling > Edit Dictionary.

**2** Choose a language dictionary from the Dictionary menu, and click Done.

### Add a word to the dictionary

By adding words to the spell-check dictionary, you can reduce the number of words that are flagged during a spell check, such as names and company terminology. You can also exclude words from being considered during a spell check. For example, if you want to use an alternate spelling for a common word like "bicycle," add it to the list of excluded words so that it is flagged during a spell check. A separate set of added and excluded words is maintained for each installed language.

**1** To add a word, do one of the following:

- During a spell check, if an unrecognized word appears in the Check Spelling dialog box, click Add to add it to the dictionary. The word is added to the language dictionary selected from the Add To menu.
- Choose Edit > Spell Checking > Edit Dictionary. Type the word you want to add in the Entry box, and then click Add. When you're finished adding words, click Done.

**2** To remove a word from the list, select the word in the Edit Custom Dictionary dialog box, and then click Delete.

### Exclude a word from a spell check

**1** Choose Edit > Check Spelling > Edit Dictionary.

**2** Choose a language from the Dictionary menu, and then choose Excluded Words from the unnamed menu.

**3** Type the word you want to exclude in the Entry box, and then click Add. When you're finished adding words, click Done.

#### Spelling preferences

You can specify whether words are spell-checked while you type, which color is used to underline words, and which dictionary language is used as the default. To open the Spelling preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Spelling from the list on the left.

**Check Spelling While Typing** When selected, underlines unrecognized words as you type in a form field or comment.

**Underline Color** Specifies the color for underlining unrecognized words.

**Dictionaries** Lists available language dictionaries for spell-checking the PDF. Dictionaries appear in the order in which the spell checker goes through dictionaries in search of words. The dictionary at the top of the list is the first dictionary searched. Click Up or Down to change its position in the list.

# Importing and exporting comments

## Import Comments

Comments can be imported from a PDF document. You can also import comments from a Forms Data Format (FDF) file or an XFDF file, which is an XML-based FDF file. You cannot open and view FDF files or XFDF files on their own.

1. In the document that you want to receive comments, choose Comments > Import Comments.
2. Choose All Files (*.*) from the menu. If you know the file format of the comments you want to import, choose it.
3. Double-click the name of the document with the comments.

The comment positioning matches that of the file from which they were imported. If comments appear out of place, the source and recipient PDF documents are likely different. For example, if you import comments from a ten-page document to a two-page document, only comments from the first two pages appear.

## Export comments

If you add comments to a PDF that isn't part of a managed review, you may need to export your comments to send them to someone, or you may need to import comments you receive. (PDFs in a managed review workflow include special options that let you send or publish your comments, rather than export them.)

When you export comments, you create a Forms Data Format (FDF) file that contains only comments. Consequently, FDF files are usually smaller than PDFs. You or another reviewer can then import the comments from the FDF file into the original PDF.

#### Export comments to a data file

1. In the PDF that contains comments, choose Comments > Export Comments To Data File.
2. Choose either Acrobat FDF Files (*.fdf) or Acrobat XFDF Files (*.xfdf) from the menu.
3. Name the file and specify a location for it.
4. Click Save to create a data file that contains only the comments.

#### Export selected comments

1. In the Comments list, select the comments you want to export.

**2** From the Options menu in the Comments list, choose Export Selected Comments.

**3** Name the file and choose Acrobat FDF Files (*.fdf) or Acrobat XFDF Files (*.xfdf) for the file type.

**4** Specify a location for the file, and then click Save.

## Export comments to Word (Windows)

In some instances, reviewers make comments in a PDF that was created from a Microsoft Word document. You can revise the original Word document by exporting these comments from the PDF. For example, text that has been inserted, crossed out, or replaced using the text edit tools in the PDF can be deleted or transferred directly to the source Word document. Formatting added to comments (for example, boldface text) is lost during this process and must be added to the Word document manually.

To revise a Word document using comments, you must create a tagged PDF from the Word document. Before you transfer text edits from the PDF, remove any extra words or information and then merge them to one PDF (if you have comments from multiple reviewers). If you plan to import comments more than once, you may want to make a copy of the Word document before you import the comments or comments may not be imported correctly.

**1** Do one of the following:

- Choose Comments > Export Comments To Word.
- In Word, open the source document, and then choose Acrobat Comments > Import Comments From Acrobat. For Word 2007, click Acrobat, and then choose Acrobat Comments > Import Comments From Acrobat.

**2** Read the instructions, and click OK.

**3** In the Import Comments From Adobe Acrobat dialog box, select the PDF and Word files, select from the following options, and click Continue:

**All Comments** Imports all comments.

**All Comments With Checkmarks** Imports only those comments marked with check marks.

**Text Edits Only: Insertions, Deletions, And Replaces** Imports only those comments that you've added using the text edit commands in the Comment & Markup toolbar.

**Apply Custom Filters To Comments** Imports only comments that you specify by author, type, or status.

**Turn Track Changes On Before Importing Comments** Shows the changes made by the imported comments in Word.

**4** (Optional) If you imported text edits, click Integrate Text Edits in the Successful Import dialog box to review and apply each edit individually. For each edit, select one of the following options:

**Apply** Makes the change in the document and deletes the comment bubble. If a comment appears to be empty, you may want to integrate it to see if it's a space or a paragraph return.

**Discard** Rejects the edit and deletes the comment bubble.

**Next** Skips to the next text edit. Text edits that are skipped or not integrated appear as bubbles in the Word document.

**Apply All** Integrates all remaining text edits and deletes the comment bubbles.

**Undo Last** Undoes the last text edit, including any manual changes.

**5** Delete comment bubbles that appear in the Word document:

- Right-click the comment bubble and choose Delete Comment.

- Choose Acrobat Comments > Delete All Comments In Document. For Word 2007, this option is on the Acrobat Ribbon.

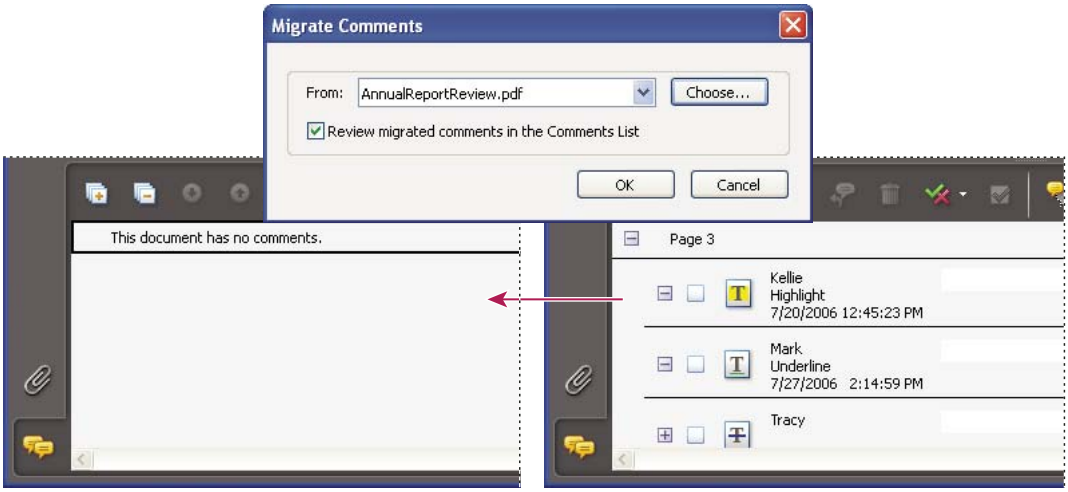
## Import comments to a revised PDF

To import new or unresolved comments to a PDF after the document has been revised, use the Migrate Comments feature. This feature attempts to place comments in the correct location by searching specific word groupings and structural elements in the revised PDF.

***Note:*** *Results may be less reliable in untagged PDFs, which lack the internal structure necessary to correctly place imported comments in a revised document.*

Text comments that reference particular words, such as highlights, cross-outs, and insertion carets, appear within the word grouping where they were originally placed. Drawing markups and sticky notes appear in the same structural location as they did in the original document. Circle, polygon, rectangle, and stamp comments always appear on the same page as the original document.

If the revised PDF no longer contains the original word groupings or logical structure order that the comment references, the migrated comment appears on the same page as the original document (or on the last page if the referenced page doesn't exist). In this case, text edits are converted to note comments.




### Migrate comments to a revised PDF

1. Open the original PDF and the revised PDF.
2. In the revised PDF, choose Comments > Migrate Comments.
3. Choose the original PDF from the From menu, and click OK.

### Set the migration status for a comment

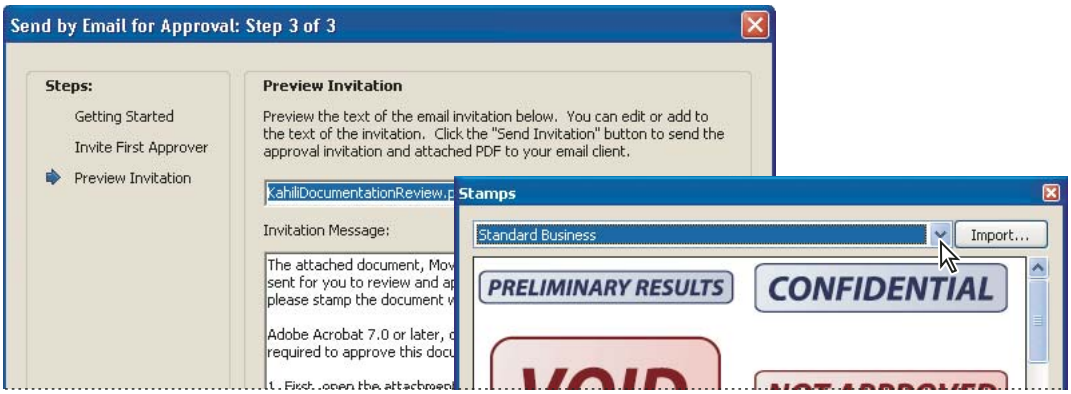
❖ In the Comments list, select the comment, click the Set Status button , and choose Migration > *[status]*.

# Approval workflows

## About approval workflows

In Acrobat (Traditional Chinese, Simplified Chinese, Japanese, and Korean only), you can send PDFs as email attachments for others to approve. When participants open an approval request in Acrobat (all languages), they can approve the PDF by adding a digital identity stamp. Then, they can send the PDF to other approvers, or return the PDF to the initiator and other appropriate participants. The initiator can track progress by choosing to be notified each time the PDF is approved. The workflow ends when the last participant adds the final approval. If a PDF isn't approved, the approval workflow must be reinitiated.

***Note:*** *To initiate an approval workflow, you must use Acrobat 7.0 or later (except for Acrobat Elements). If you use Acrobat Professional to initiate the workflow, you can invite users of Adobe Reader 7.0 or later to participate by enabling commenting in the PDF.*




*Wizard sets up approval workflows (left); Stamps palette provides digital identity stamps for approving documents (right).*

## Send a PDF for approval

When you send a PDF by email for approval (Traditional Chinese, Simplified Chinese, Japanese, and Korean only), approvers receive the PDF as an email attachment. When recipients open the PDF attachment, they can apply a digital identity stamp from the Stamps palette and then make the appropriate selection in the document message bar.

To send a PDF for approval, use the wizard in Acrobat. The wizard provides on-screen instructions to help you invite approvers, customize instructions, and send the PDF.

Before you initiate an approval workflow, make sure that your email application is configured to work with Acrobat.

**1** To start an approval workflow, do one of the following:

- Click the Review & Comment button in the Task toolbar, and choose Send By Email For Approval.
- Choose Comments > Send By Email For Approval.

**2** If prompted, enter your email address in the Identity Setup dialog box.

**3** Click Browse (Windows) or Choose (Mac OS), select a PDF, click Open, and click Next.

**4** Type the email address for the first approver in the To box.

**5** If you want to be notified of the approval status for each participant, specify those options.

**6** (Optional) Type additional instructions for the first approver at the top of the email message.

Only the default text message and instructions are forwarded to subsequent approvers.

***Note:*** *The invitation email contains instructions to help participants complete the approval process. Avoid changing or removing this text.*

**7** Click Send Invitation.

## Participate in an approval workflow

If you're invited to participate in an approval workflow, you receive an email message that provides step-by-step instructions for approving the attached PDF. When you open the PDF, the Stamps palette and the How To window open, and the document message bar appears at the top of the PDF. If your version of Acrobat is earlier than 7.0, you're prompted to download the latest version of Adobe Reader.

You can select any of the digital identity stamps in the Stamps palette to approve the document. A digital identity stamp contains identity information that you provide, such as name, title, organization, and email address, and it can be used in place of a signature. When you apply a stamp, it becomes part of the document's page content. You can delete your own stamp during the approval process; however, once the approval process is completed, your stamp is locked. You can't move or delete stamps from other participants.

You may also reject documents that don't meet your standards.

In addition to adding digital stamps to a PDF, you can add other types of comments, including note comments, text edits, custom stamps, and file attachments.

### See also

"Create a custom stamp" on page 166

"Commenting and markup tools overview" on page 158

"Select an email application for reviews" on page 145

#### Approve a PDF

**1** Open the PDF attachment in the approval invitation email message.

***Note:*** *If you haven't added identity information to the stamp, you're prompted to do so.*

**2** Select a stamp from the Stamps palette. (To view all stamps, scroll or drag a corner to resize the window.)

**3** Click the document to apply your approval stamp.

***Note:*** *To delete a digital identity stamp that you've applied, select it and press Delete. If you select Print, Save A Copy, or Email during the approval process, you can't delete your stamp.*

**4** Do one of the following:

- To send the document to the next approver, click the Approve button in the document message bar. In the Send To Next Approver dialog box, type the email address for the next approver in the To box, add addresses for other recipients as appropriate, and click Send.
- To complete the approval process, click the Final Approval button in the document message bar. In the Complete Final Approval dialog box, specify whether to send an approval notification from the Final Approval Method menu. If you send a notification, type an email address in the To box, add addresses for other recipients as appropriate, and click Send. If you don't send a notification, click Complete.

If the Notify Initiator Of Approval Status Via Email option is selected, a separate email notification appears, addressed to the initiator. Click Send to send this notification.




*PDFs in an approval workflow present instructions and tools.*

**5** Save the PDF.

***Important:*** *If you use the Email button in the toolbar to send the PDF, the PDF is no longer part of the workflow, and approval options aren't available to the recipient of that email message.*

### Reject a PDF

If the PDF you received in an approval request doesn't meet the requirements for approval, use the options in the document message bar to reject the document and return it to the initiator. If a PDF is rejected, the approval workflow must be reinitiated.

**1** Open the PDF attachment in the approval invitation email message.

**2** Click the Reject button in the document message bar.

**3** In the Reject And Send Notification dialog box, type the email address for the initiator in the To box. If the Notify Initiator Of Approval Status Via Email option is selected, a separate email message is sent to the approval initiator. Click Send.

**4** Click Send in the email message that appears.

### Add or change identity information for a digital stamp

**1** From the Stamp menu, choose Show Stamps Palette.

**2** In the Stamps palette, select Digital Identity Stamps, right-click/Control-click your stamp, and choose Edit Identity.

**3** In the Identity Setup dialog box, type or edit your name, title, company name, department, and email address, and click Complete.

*You can also change your identity information by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS) and selecting Identity on the left.*

# Chapter 7: Forms

Adobe PDFs can be interactive forms that can streamline the process of filling out a form and of collecting form information.

You can create PDF forms using either Adobe Acrobat 8 Professional or Adobe LiveCycle Designer (included with Acrobat Professional). Filling in a form can be done in either Acrobat or the free Adobe Reader.

## Quickstart

The following topics provide overview steps to some common forms tasks.

### Fill in a form with fields

An *interactive* PDF form contains form fields that can be selected or filled in.

**1** Click to select options, such as radio buttons. Click inside a text field to type.

**2** Press Tab to move forward or Shift+Tab to move backward.

**3** When finished, click the submit button, if applicable, and save or print the form if desired.

To fill out noninteractive PDF forms, use the Typewriter tool (if enabled).

#### See also

"Fill in and clear a form" on page 186

### Type on a form without fields

If a PDF form doesn't contain *interactive* form fields that can be selected or filled in, you can still fill in the form online.

**1** Choose Tools > Typewriter > Typewriter.

**2** Click over a blank form field and type.

**3** (Optional) Choose Tools > Typewriter > Show Typewriter Toolbar. Use these tools to change the size or position of the typed text.

**4** When finished, print a copy of the completed form.

#### See also

"Fill in and clear a form" on page 186

### Return a filled-in form

You have several options for returning form data.

**1** To return an interactive form, do any of the following:

- Click the submit button.

- Save and email the form (if enabled by the form creator).
- Print and mail the form.

2 To return a noninteractive form, do one of the following:

- If you filled in the form with the Typewriter tool, print and mail the form.
- Print the form, fill it in by hand, and mail it.

### See also

"Fill in and clear a form" on page 186

# Forms basics

## What are PDF forms?

You're already familiar with paper forms: documents with blanks that people fill in and deliver to the appropriate person or organization. An Adobe PDF form is a computer-based version of a form, which can either be distributed through email or CDs, or published on a website.

PDF forms can be ordinary PDFs with blank form fields or they can be *interactive*. Ordinary PDFs are a convenient way of publishing forms that must be printed, filled out by hand, and physically delivered, such as by mail or fax. An interactive form can be filled out on a computer and may be submitted through an Internet or local network connection. The built-in security features can safeguard the privacy of electronically submitted data.

Interactive forms simplify the work users must do to provide the needed information. Electronically submitted forms can be labor-saving at the receiving end, too, because the data from many individuals can be set up to be collated automatically.

***Note:*** *You cannot create forms using Acrobat Standard. You can use Adobe LiveCycle Designer (Windows), Acrobat Professional, or Acrobat 3D to create forms. For information on these products, choose Help > Acrobat Online to visit the Adobe Acrobat website.*

## Viewing a PDF form

When you open a form that someone sends you to fill out, a document message bar appears between the Acrobat toolbars and the form itself.

The left side of the message bar typically displays instructions about how to complete and return the form. If you open the form in Adobe Reader, the usage rights associated with that form are also described in this area. You can hide or show the document message bar by clicking its button .

The right side of the message bar has one or more buttons. The first is a Highlight Fields button , which colors the backgrounds of all blanks to be filled in and outlines any required blanks, making it easy to see them at a glance.

You navigate and adjust views of a form in exactly the same way that you do in ordinary PDFs.

***Note:*** *You can change the default settings for highlight color, whether forms open with the document message bar visible or hidden, and other viewing options in the forms preferences. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Forms under Categories.*

## Types of PDF forms

The way in which you fill in and submit information on a PDF form is determined by the person who created it.

**Fill-and-print PDF forms** Contain interactive form fields or static form fields; either way, the person filling in the form must manually deliver a printed copy of the form, such as by mail or fax.

**Submit-by-email PDF forms** Contain a button that either extracts all interactive-field data from the PDF form and attaches it to an email message or attaches the entire filled-in PDF form to the message.

**Submit-online PDF forms** Contain a button that sends all interactive-field data to an online repository, such as a database. Available only when Acrobat is open inside a web browser.

*When you fill in a PDF form, you can press Tab to jump from one form field to the next. After you Tab to a check box or button that you want to select, press Enter or spacebar to select it (or to deselect it, if it's already selected).*

Another important distinction is between XML forms and other PDF forms. You can create and edit XML forms in LiveCycle Designer but not in Acrobat.

## Printing and saving PDF forms

Interactive forms can be filled in using either Adobe Reader or Acrobat. Users running either of these applications can save a blank version of the form, and they can print copies of their completed forms before submitting them.

After a form is filled in, Acrobat users can save a copy of the completed form, showing all the information they typed. Whether or not Adobe Reader users can save a copy of a completed form depends on the usage rights set up by the person who created that form.

***Note:*** *When you open a form in Adobe Reader, the usage rights appear in the notification area above the form itself.*

## About security for PDF forms

As with all sensitive data you transmit, precautions should be taken to minimize the likelihood of interception and use by malicious parties. Such precautions may include the use of encryption, passwords, and other security measures on your document.

All Adobe products enforce the restrictions set by the permissions password. However, not all third-party products fully support and respect these settings. Recipients might be able to bypass some or all of the restrictions you've set.

### See also

"Opening restricted documents" on page 195

## Forms preferences

Set forms preferences to control various aspects of your interaction with form fields.

To open the Preferences dialog box, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then select Forms on the left. The forms preferences are organized in three sections: General, Highlight Color, and Auto-Complete

***Note:*** *The forms preferences apply to the way the application handles open forms as you work. The preferences aren't saved with the PDF forms themselves.*

### See also

"Change the Auto-Complete options" on page 188

#### General

**Automatically Calculate Field Values** Automatically performs all field calculations upon user entry.

**Show Focus Rectangle** Indicates which form field currently has the focus.

**Keep Forms Data Temporarily Available On Disk** Retains forms data in the web browser if you briefly go to another web page and then click Back to return to the PDF form.

**Show Text Field Overflow Indicator** Displays a plus sign (+) in text fields that exceed the bounds specified when the fields were created.

**Always Hide Forms Document Message Bar** Hides the forms document message bar by default whenever a PDF form is opened in Adobe Reader.

#### Highlight Color

**Show Border Hover Color For Fields** Displays a black outline around a form field when you place the pointer over it.

**Fields Highlight Color** Opens a color picker for selecting the color of highlighted form fields. The highlight appears when the Highlight Fields button on the document message bar is clicked.

**Required Fields Highlight Color** Opens a color picker for selecting the border color of form fields that must be filled in. The border appears for required form fields only after you attempt to submit the form.

#### Auto-Complete

**Auto-Complete menu** Displays three options for Auto-Complete: Off, Basic, or Advanced.

**Remember Numerical Data** Suggests your previously entered numerical entries when you type the same first character into a similar field. When deselected, Auto-Complete offers suggestions only for text entries. (Available only when Basic or Advanced is selected.)

**Edit Entry List** Displays current entries stored in the Auto-Complete memory. You can select and delete any entries that you don't want to keep for filling in future forms. (This option isn't available if no entries are in the memory.)

# Filling in PDF forms

## Fill in and clear a form

If a PDF form contains interactive form fields, you can fill in the form with one of the tools in the Select & Zoom toolbar: the Hand tool or the Select tool. When you place the pointer over an interactive form field, the pointer icon changes to one of the following:

- Pointing Finger or Pointing Hand Plus icon. Appears when the pointer is over a button, radio button, check box, or item in a list.
- Arrow. Appears when you can select an item in a list of options.
- I-beam icon. Appears when you can type text into the form field.

If the form fields aren't interactive, the basic pointer icon doesn't change.

Noninteractive PDF forms can be printed and filled in by hand. Or, you can choose Tools > Typewriter > Typewriter and use the Typewriter tool to type information over the blank form fields and then print a copy of the completed form.

***Note:*** *Some text fields are dynamic, meaning that they automatically resize to accommodate the amount of data you enter and can span across pages.*

## See also

"Forms preferences" on page 185

### Fill in an interactive form

**1** If necessary, select either the Hand tool or the Select tool.

**2** (Optional) To make form fields easier to identify, click the Highlight Fields button on the document message bar. Form fields appear with a colored background (light blue by default), and all required form fields are outlined in another color (red by default).

**3** Click in the first form field you want to fill in, either to select that option or to place an I-beam pointer in the field so you can start typing.

**4** After making a selection or entering text, do any of the following:

- Press Tab or Shift+Tab to accept the form field change and go to the next or previous field.
- Press the Up Arrow or Left Arrow key to select the previous radio button in a group of radio buttons, or press the Down Arrow or Right Arrow key to select the next radio button.
- Press Esc to reject the form field change and deselect the current form field. If you're viewing the form in Full Screen mode, pressing Esc a second time causes you to exit Full Screen mode.

***Note:*** *If the current form field is a single-line text box, you can press Enter (Windows) or Return (Mac OS) to accept your typing and deselect the field. If the current field is a check box, pressing Enter or Return turns the check box on or off. In a multiline text form field, pressing Enter or Return creates a paragraph return in the same form field. In all cases, you can press Enter on the keypad to accept the change and deselect the current form field.*

**5** After you fill in the form fields, do any of the following:

- Click the submit form button, if one exists. Clicking this button sends the form data to a database across the web or over your company intranet.
- Choose File > Save As, and rename the file to save the form with the data you entered.
- Export the form data.
- Print the form.

### Clear a form in a browser

❖ Do either of the following:

- Select the reset form button, if one exists. You cannot undo this action.
- Quit the browser, and start again.

***Note:*** *Clicking the web browser's Reload or Refresh button, the Back or Go Back button, or following a link to another page may not completely clear the form.*

### Clear unsaved form entries

❖ Choose File > Revert.

## Change the Auto-Complete options

The Auto-Complete feature stores any entries that you type in a PDF form field, and then suggests or even automatically enters responses that match your typing in other form fields. The suggestions appear in a pop-up menu, from which you can select a match. The Auto-Complete feature is off by default, so you must enable it in the forms preferences if you want to use it.

If you want to remove an entry from the Auto-Complete memory—such as a misspelled entry that you found and corrected later—you can edit the list in the preferences.

### Enable the Auto-Complete feature

1 Choose Edit > Preferences (Windows) or choose Acrobat > Preferences (Mac OS).

2 Select Forms on the left.

3 Under Auto-Complete, choose Basic or Advanced from the menu.

4 Select Remember Numerical Data if you want the Auto-Complete memory to store numbers that you type into forms.

*When you select an option in the Auto-Complete menu, a description of how it affects the Auto-Complete behavior appears in the text area below.*

### Delete an entry from the Auto-Complete memory

1 Choose Edit > Preferences (Windows) or choose Acrobat > Preferences (Mac OS).

2 Select Forms on the left.

3 Click Edit Entry List.

4 In the Auto-Complete Entry List dialog box, do one of the following, and then click Yes in the confirmation dialog box:

- To remove all of the entries, click Remove All.
- To remove some of the entries, select the entries and click Remove. (Shift-click to select multiple adjacent entries; Ctrl-click /Command-click to select multiple nonadjacent entries.)

## Adding lengthy entries in forms

PDF forms can contain *dynamic text fields,* which grow in size to accommodate the text you type into it. A scroll bar appears in dynamic text fields when the text you type exceeds the current size of the field; when you're finished typing and the field is deactivated, the text field expands to display all of the typed text.

If necessary, the field may span onto the next page. If you want to continue editing a dynamic text field that spans across pages, you can begin editing the field on either page; you'll have access to all of the text in the field.




*Entering text in form field that spans across two pages*

## Filling in forms with barcodes

Some forms include barcode fields, which capture and display other information in the form as a black-and-white pattern. You don't have to do anything with the barcode area itself. As you fill in the form on your computer, the information you enter is included in the barcode and changes the barcode appearance.

***Important:*** *For any form with barcode fields, it's essential that you fill it in on your computer. Don't fill it in by hand on a printed copy. If you're going to submit the form on paper, such as by mail or fax, be sure to fill it in electronically before you print it.*

The barcode field makes collecting data easier for the form recipient because the barcode can simply be scanned. The results are an accurate and detailed summary of your input.

## Search a form

When you search for words in a PDF, the search includes any text appearing in form fields (as well as other text in the PDF), whether you typed the text or selected it from a list or menu on the form.

❖ Do one of the following:

- Type the text you want to search for in the Find box in the toolbar, and then press Enter. To find the next instance of the search text, press Enter again.
- Choose Edit > Search, and type the text into the Search window. Then select other basic or advanced options for searching, and click Search.

## Spell-check form entries

You can spell-check the text you typed in note comments and form fields. If you want to check the spelling in a comment, first open the comment window.

You cannot check the spelling of text in the underlying Adobe PDF document.

### Correct a misspelling

❖ Right-click/Control-click the word in the form field or comment window, and then choose the correct word from the list of alternatives.

### Spell-check entries and comments

**1** Choose Edit > Check Spelling > In Comments. If the PDF document is open in a web browser, make sure that the Edit toolbar is open, and click the Spell Check button .

**2** Click Start to begin the spell check. When a word that may be misspelled is found, it appears under Word Not Found. Suggested corrections appear under Suggestions.

**3** If a possibly misspelled word appears under Word Not Found, do any of the following:

- Edit the unrecognized word by typing. To undo your change, click Undo Edit. To accept your change, click Change. To change all instances of the unrecognized word, click Change All.
- Select the correct version of the unrecognized word from the Suggested Corrections section and click Change. Or, simply double-click the correct version of the word. To change all instances of the word to the selected correct version, click Change All.
- Click Ignore if you don't want to change the word and want to continue with the check.
- Click Ignore All to ignore every instance of the word. Click Add if you want to add the word to your personal dictionary.

**4** After you make a selection in step 3, the next unrecognized word (if any) is highlighted; repeat step 3 until the Restart button appears.

**5** Click Done.

#### Specify a dictionary

**1** Choose Edit > Check Spelling > Edit Dictionary.

**2** Choose the language dictionary you want to use from the Dictionary menu, and then click Done.

### Import form data

As an alternate to filling in a PDF form manually, you can import file data from a text (TXT), Extensible Markup Language (XML), Acrobat Form Data Format (FDF), XML Data Package File (XDP), FormFlow99 Data File (XFD), or Acrobat XFDF (XFDF) file into a PDF form. Some file formats are available only if you import the data into particular PDF forms, such as a PDF form created in LiveCycle Designer.

***Note:*** *If you import data from a text file, each row in a text file must be tab-delimited to create columns, as in a table. When a row of data is imported, each cell becomes the value of the form field that corresponds to the column name.*

**1** Open the PDF form.

**2** Choose Forms > Manage Form Data > Import Data.

**3** Choose the form data type from the Files Of Type menu, select a file, and click Select.

***Note:*** *If you import form data from a form that doesn't match the form you're importing into, only the form fields that match are updated, and those that don't match are ignored. Existing text in text form fields is replaced if you import data to those fields.*

### Commenting on forms

Acrobat users can comment on PDF forms, just as on any other PDF. If the form creator has extended rights to Adobe Reader users, they can also add comments.

Whether or not these comments are included when the form is submitted depends on how it's submitted. For example, if you use Reader to print the form for mailing or faxing, the comments don't appear. If you attach the filled-in form to email as a complete PDF, the comments are included.

#### See also

"Commenting" on page 158

# Submitting forms

### Exporting and emailing forms

You can export data you enter into a form to a separate file. When you export the form data, it's saved in a file that's considerably smaller than the original PDF. A smaller file is preferable for archiving or sharing the data electronically. Depending on how the form was created, you can save the form data as a tab-separated text (TXT), Acrobat XFDF (XFDF), Acrobat Form Data Format (FDF), or Extensible Markup Language (XML) file; or, you are able to save the form only in XML or XDP format.

You can also import data from an exported file into another form if that form has fields with the same names. Alternatively, you can import file data from a text file.

PDF forms can contain an email-based submit button that exports the data you entered. You can email the form data with a desktop or web-based email application, or you can submit the form data at a later time.

***Note:*** *If the PDF form doesn't contain an email-based submit button, it may have a submit button that sends the form data via the web or some other service.*

### See also

"Import form data" on page 190

## Export form data to a file

**1** Open the PDF form and fill it in.

**2** Choose Forms > Manage Form Data > Export Data.

**3** Choose a format from the Save As Type menu, specify a location and filename, and click Save.

## Email a form using your email application

When you click an email-based submit button in a PDF form, you have the option to submit the form data with your preferred desktop email application.

**1** Click the submit or return form button on the PDF form.

**2** In the Select Email Client dialog box, select Desktop Email Application; then click OK.

Your default email application displays a new email message with the To, Subject, Body, and Attachment fields automatically filled in.

**3** Send the email.

## Email a form using a web service

When you click an email-based submit button in a PDF form, you have the option to submit the form data with a web-based email service.

**1** Click the submit or return form button on the PDF form.

**2** In the Select Email Client dialog box, select Internet Email; then click OK.

**3** Click Save PDF File or Save Data File, specify a location for the file, and click Save.

**4** Log in to your web-based email service, and create a new, blank email message.

**5** In the Sending The PDF File dialog box in Acrobat, copy the text in the To box.

**6** In the blank email message, paste the copied text into the To box. Repeat the process for the Subject and Message Text boxes.

**7** Attach the file that you saved to the email message.

### Submit a PDF form at a later time

When you click an email-based submit button in a PDF form, you have the option of not submitting the form data, but instead saving it on your computer to send at a later time.

**1** Click the submit or return form button on the PDF form.

**2** In the Select Email Client dialog box, select Other, and then click OK.

**3** Click Save PDF File or Save Data File, specify a location for the file, and click Save.

**4** Write down the values that appear in the To, Subject, and Message Text boxes so you'll have them when you're ready to email the form data.

**5** To email the form data, create a new message in your email application. Enter the To, Subject, and Message Text values that you wrote down, attach the data file that you saved, and send the email.

# Collecting and managing form data

### About Forms Tracker

The Forms Tracker is a panel of the same window in which you track PDF reviews and subscriptions.

There are several ways to open the Forms Tracker:

- Choose Forms > Track Forms.
- In the Review Tracker window (opened by choosing Comments > Review Tracker), click the Forms Tracker button  on the left side of the window.

Four buttons appear on the left side of the Forms Tracker. Each one opens a different panel when clicked: To Do, History, Search Results, and Forms Library. These panels can remind you of the status of various forms that are part of your workflow and make it easy to find and reopen those forms.

# Chapter 8: Security

Document security is similar to home security. Just as you lock your doors to prevent someone from entering your house without permission, you use security features to lock an Adobe PDF. For example, you can use passwords to restrict users from opening, printing, and editing PDFs. You can use a certificate to encrypt PDFs so that only an approved list of users can open them. If you want to save security settings for later use, you can create a security policy that stores security settings.

***Note:*** *To apply security features to PDFs, you need Adobe Acrobat 8 Professional, Acrobat 8 Standard, or Acrobat 3D Version 8.*

## Quickstart

The following topics provide an overview of some common security tasks.

### Check security restrictions

When you receive a PDF, it may contain restrictions preventing actions such as printing or copying information.

**1** Click Security Settings or Signatures to the left of the document window. (The Security Settings button only appears when the PDF contains security restrictions.)

**2** View restriction information. In the Security Settings panel, you can click Permission Details to get more information.

If you cannot open a PDF or are restricted from using certain features, contact the PDF author.

#### See also

"Open secured PDFs" on page 195

### Examine a PDF for hidden content

Before making a PDF available to others, you may wish to remove content that reveals the document history or that contains your personal information, such as metadata that lists your name as the author.

**1** Choose Document > Examine Document.

**2** Select the items you want removed from the PDF, and click Remove All Checked Items.

**3** Save the document with a new name.

#### See also

"Examine a PDF for hidden content" on page 197

### Register a digital ID

You must register a digital ID in Acrobat before you can use it.

**1** Choose Advanced > Security Settings.

2 Select Digital IDs, and click Add ID.

3 Select Browse For An Existing Digital ID File.

4 Follow the on-screen instructions to select the digital ID file, type your password, and register the digital ID.

You can create self-signed digital IDs in Acrobat. Or, see the Adobe website for information on acquiring a digital ID from Adobe security partners.

### See also

"Register a digital ID" on page 199

## Create a self-signed digital ID

A digital ID is required to sign documents and apply certificate security. Self-signed digital IDs created from Acrobat may be adequate for many situations. See the Adobe website for information on acquiring a digital ID from Adobe security partners.

1 Choose Advanced > Security Settings.

2 Select Digital IDs, and click Add ID.

3 Select Create A Self-Signed Digital ID For Use With Acrobat.

4 Follow the on-screen instructions to set up the self-signed digital ID.

### See also

"Create a self-signed digital ID" on page 199

## Share your certificate

Your digital ID includes a certificate that others require to validate your signature and encrypt documents for you.

1 Choose Advanced > Security Settings.

2 Select Digital IDs on the left.

3 Select the ID you want to share, and click Export .

4 Follow the on-screen instructions to email the certificate or save it to a file.

If you use a third-party security method, you usually don't need to share your certificate with others.

### See also

"Sharing certificates with others" on page 203

## Add a document password

One way to restrict access to a PDF is to add a Document Open password.

***Important:*** *There is no way to open the PDF if you forget the password.*

1 Click Secure on the Tasks toolbar, and choose Password Encrypt.

2 Select Require A Password To Open The Document, and type a case-sensitive password in the text box.

If the PDF already has security applied, you may need to supply the Permissions password that lets you change security settings.

### See also

"Set passwords for PDFs" on page 209

### Prevent changes to a PDF

Add security restrictions to help prevent others from changing your PDF.

1 Click Secure on the Tasks toolbar, and choose Password Encryption.

2 Select Restrict Editing And Printing Of The Document, and type a Permissions password.

3 Choose an option from the Changes Allowed menu.

For information on using other security methods to restrict access, see Help.

### See also

"Set passwords for PDFs" on page 209

### Create secure attachments

You can add security to both PDF and non-PDF documents by embedding them in an encrypted envelope, called a *security envelope*, that you can send as an email attachment.

1 Click Secure on the Tasks toolbar, and choose Create Security Envelope.

2 Click Add File To Send, and select the desired documents.

3 Click Next, and follow the on-screen instructions to create the security envelope.

Recipients can extract and save the encrypted documents. Once saved, the documents are no longer encrypted.

### See also

"Create secure attachments" on page 213

# Opening restricted documents

### Open secured PDFs

If you receive a PDF that is protected by security features, you may need a password to open the document. Some protected documents have restrictions that prevent you from printing, editing, or copying content in the document. If a document has restricted features, any tools and menu items related to those features are dimmed.

❖ If a document is restricted or has a special status, the Security Settings button or the Signatures button appear to the left of the document window. Click the button to discover the protection settings and determine which features are restricted.

If you have trouble opening a PDF, or if you're restricted from using certain features, contact the author of the PDF.

### Restrict URLs and attachments in PDFs

Acrobat warns you any time you try to open a URL (web link) or a file attachment that uses a disallowed file type. URLs and disallowed file types (for example, EXE) are potentially dangerous because they can transfer or run programs, macros, or viruses that can damage your computer.

You can allow Acrobat to contact specific websites by adding those URLs to your list of allowed websites in the Trust Manager preferences. Remove any URLs you no longer want to visit. To open file attachments in Acrobat, you must respond to a prompt by indicating that you always allow files of that type. The attachment's file type is then added to a list stored in the registry. If you want to restrict a file type that you permitted in the past, you can reset this list to its default settings in the Trust Manager preferences.

#### Trust Manager preferences

To open the Trust Manager preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Trust Manager on the left.

**Allow Opening Of Non-PDF File Attachments With External Applications** When selected, allows file attachments to start external applications when you open the files. You must have the external applications to open the files.

**Restore Default List Of Allowed And Disallowed File Attachment Types** Removes saved settings you chose for opening attachments. For example, if you chose to always open TMP attachments when prompted, TMP appears on the list of allowed file attachment types. By clicking Restore, you remove TMP from the list.

**Change Settings** When clicked, lets you specify the default behavior for accessing the Internet from PDFs. To restrict access to only the URLs you specify, select Let Me Specify A List Of Allowed And Blocked Web Sites (the default). To allow access to all URLs, select Allow All Web Sites. To restrict access with all URLs in PDFs, select Block All Web Sites.

To specify a list of allowed and blocked websites, type each URL in the text box, and click Allow or Block. Then specify the default behavior for Acrobat for websites that aren't in the list.

***Note:*** *If you open a protected PDF and a security warning dialog box prompts you to allow or block a URL, select Remember My Action For This Site, and the URL is added to this list.*

**Allow External Content** Allows Acrobat to read data from stream objects in a PDF. Stream objects are URLs or file specifications identified by flags, as specified in *PDF Reference Version Fifth Edition: Adobe Portable Document Format Version 1.6*. Use this option if you're a PDF developer who creates PDF files that contain streams, or if you work with these types of files.

# Removing sensitive content

### Preparing PDFs for distribution

Before you distribute a PDF, you may want to examine the document for sensitive content or private information that can trace the document to you. Such information may be hidden or not immediately apparent. For example, if you created the PDF, the document metadata likely lists your name as the author.

You may also want to remove content that can inadvertently change and modify the document's appearance. JavaScripts, actions, and form fields are types of content that are subject to change. If your document doesn't require these items, remove them before you distribute the document. You can use the Examine Document command to find and remove hidden content from a PDF.

## Examine a PDF for hidden content

Use the Examine Document feature to find and remove content from a document that you don't want, such as hidden text, metadata, comments, and attachments.

*If you want to examine every PDF for hidden content before you close it or send it in email, specify that option in the Documents preferences (choose Edit > Preferences [Windows] or Acrobat > Preferences [Mac OS], and select Documents on the left).*

**1** Choose Document > Examine Document.

If items are found, they are listed in the Examine Document dialog box with a selected check box beside each item.

**2** Make sure that the check boxes are selected only for the items that you want to remove from the document:

**Metadata** Metadata includes information about the document and its contents, such as the author's name, keywords, and copyright information, that can be used by search utilities. To view metadata, choose File > Properties.

**File Attachments** Files of any format can be attached to the PDF as an attachment. To view attachments, choose View > Navigation Panel > Attachments.

**Annotations And Comments** This item includes all comments that were added to the PDF using the comment and markup tools, including files attached as comments. To view comments, choose View > Navigation Panel > Comments.

**Form Field Logic Or Actions** This item includes form fields (including signature fields), and all actions and calculations associated with form fields. If you remove this item, all form fields are flattened and can no longer be filled out, edited, or signed.

**Hidden Text** This item indicates text in the PDF that is either transparent, covered up by other content, or the same color as the background. To view hidden text, click Preview. Click the double-arrow buttons to navigate pages that contain hidden text, and select options to show hidden text, visible text, or both.

**Hidden Layers** PDFs can contain multiple layers that can be shown or hidden. Removing hidden layers removes these layers from the PDF and flattens remaining layers into a single layer. To view layers, choose View > Navigation Panel > Layers.

**Bookmarks** Bookmarks are links with representational text that open specific pages in the PDF. To view bookmarks, choose View > Navigation Panel > Bookmarks.

**Embedded Search Index** An embedded search index speeds up searches in the file. To determine if the PDF contains a search index, choose Advanced > Document Processing > Manage Embedded Index. Removing indexes decreases file size but increases search time for the PDF.

**Deleted Hidden Page And Image Content** PDFs sometimes retain content that has been removed and which is no longer visible, such as cropped or deleted pages, or deleted images.

**3** Click Remove All Checked Items to delete selected items from the file, and click OK.

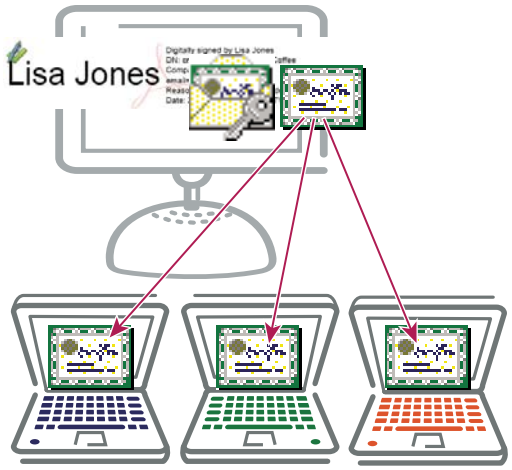
***Note:*** *When you remove checked items, additional items are automatically removed from the document: digital signatures; document information added by third-party plug-ins and applications; and special features that enable Adobe Reader users to review, sign, and fill in PDF documents.*

**4** Choose File > Save, and specify a filename and location. If you don't want to overwrite the original file, save the file to a different name, location, or both.

The selected content is permanently removed when you save the file. If you close the file without saving it, you must repeat this process, making sure to save the file.

# Creating or obtaining digital IDs

## About digital IDs




*Digital IDs include a private key that you safeguard and a public key (certificate) that you share.*

A *digital ID* is like a driver's license or passport. It proves your identity to people and institutions that you communicate with electronically. A digital ID usually contains your name and email address, the name of the company that issued your digital ID, a serial number, and an expiration date.

Digital IDs operate by using a key pair: the public key locks, or encrypts, data; the private key unlocks, or decrypts, that data. When you sign PDF documents, you use the private key to apply your digital signature. You distribute the *certificate* that contains your public key and other identifying information to those who need to validate your signature, verify your identity, or encrypt information for you. Only your private key can unlock information that was encrypted using your certificate, so be sure to store your digital ID in a safe place.

You must have a digital ID to sign, certify, and apply certificate encryption to PDFs. You can get a digital ID from a third-party provider, or you can create a self-signed digital ID. Self-signed digital IDs may be adequate for many situations. However, to prove your identity in most business transactions, you may need a digital ID from a trusted third-party provider, called a *certificate authority*. Because the certificate authority is responsible for verifying your identity to others, choose one that is trusted by major companies doing business on the Internet. See the Adobe website for information about Adobe security partners that offer digital IDs and other security solutions.

You can have multiple digital IDs that you use for different purposes, particularly if you sign documents in different roles or using different certification methods. Digital IDs are usually password protected and can be stored on your computer in PKCS #12 file format, on a smart card or hardware token, in the Windows certificate store, or on a signing server (for roaming IDs). Acrobat includes a default signature handler that can access digital IDs from any of these following locations. (You must register the digital ID in Acrobat for it to be available for use.)

### See also

"Sharing certificates with others" on page 203

"Smart cards and hardware tokens" on page 200

## Register a digital ID

You must register your digital ID in Acrobat before you can use it. If you obtained or created a digital ID file that doesn't appear in your list of digital IDs, you can search for the missing digital ID file and add it to the list. You can identify digital ID files by their file extensions. For PKCS #12 files, the extension is .pfx in Windows and .p12 in Mac OS. Digital ID files from some earlier versions of Acrobat have an .apf extension. If you select an .apf digital ID file, you may be prompted to convert it to a supported file type. You may need the password created for the digital ID to complete this task.

**1** Choose Advanced > Security Settings.

**2** Select Digital IDs on the left.

**3** Click the Add ID button .

**4** Select one of the following options:

**Browse For An Existing Digital ID File** Select this option if you obtained a digital ID as an electronic file or if you store it in the Windows certificate store. Follow the prompts to select the digital ID file, type your password, and add the digital ID to the list.

**Configure A Roaming ID For Use On This Computer** Select this option to use a digital ID that's stored on a signing server. When prompted, type the server name and URL where the roaming ID is located.

**Create A Self-signed Digital ID For Use With Acrobat** Select this option to create a self-signed digital ID.

**Look For Newly Inserted Hardware Tokens** Select this option if you have a security token or hardware token connected to your computer.

**5** Click Next, and follow the on-screen instructions to register your digital ID.

## Create a self-signed digital ID

If you're not using a third-party digital ID, you can create your own self-signed digital ID. When you create a self-signed digital ID, the resulting file stores an encrypted private key used for signing or decrypting documents and a public key contained in a certificate, which is used for validating signatures and encrypting documents.

**1** Choose Advanced > Security Settings.

**2** Select Digital IDs on the left, and then click the Add ID button .

**3** Select Create A Self-Signed Digital ID For Use With Acrobat, and click Next.

**4** Specify where to store the digital ID, and click Next.

**New PKCS#12 Digital ID File** Stores the information in a file that you can send to others. This is a standard encryption format with a .pfx extension in Windows and .p12 in Mac OS.

**Windows Certificate Store (Windows only)** Stores the file where other Windows applications can also retrieve it.

**5** Type a name, email address, and other personal information for your digital ID. When you certify or sign a document, the name appears in the Signatures panel and in the signature field.

**6** (Optional) To use Unicode values for extended characters, select Enable Unicode Support, and then specify Unicode values in the appropriate boxes.

**7** Choose an option from the Key Algorithm menu. 2048-bit RSA offers more security than 1024-bit RSA, but 1024-bit RSA is more universally compatible.

**8** From the Use Digital ID For menu, choose whether you want to use the digital ID for signatures, data encryption, or both. Click Next.

**9** Specify a filename and location for the digital ID file.

**10** Type a password; passwords are case-sensitive, must contain at least six characters, and may not contain double quotation marks or the following characters: ! @ # $ % ^ & * , | \ ; < > _. Type the same password in both the Password and Confirm Password boxes. Click Finish.

You can export and send your certificate file to those who need to validate your signature.

***Important:*** *Make a backup copy of your digital ID file. If your digital ID file is lost or corrupted, or if you forget your password, you cannot use that profile to add or validate signatures.*

### See also

"Sharing and managing certificates" on page 203

## Set up a roaming ID account

A *roaming ID* is a digital ID that is stored on a server and can be downloaded—at the subscriber's request—to the roaming subscriber's location. You must have a working Internet connection to access a roaming ID.

**1** Choose Advanced > Security Settings.

**2** Expand Digital IDs on the left, select Roaming ID Accounts, and click Add Account.

**3** Type the name and URL for the roaming ID server, and click Next.

**4** Type the user name and password you've been assigned or follow the directions to create a new account. Click Next, and then click Finish.

**5** If you don't need to use your roaming ID, select it, and click Logout.

When you perform a task that uses your roaming ID, you're automatically logged in to the roaming ID server if your authentication assertion hasn't expired.

### See also

"Configure a directory server manually" on page 207

## Smart cards and hardware tokens

A *smart card* looks like a credit card and stores your digital ID on an embedded microprocessor chip. You can use the digital ID on a smart card to sign and decrypt documents on devices that include a smart card reader.

Similarly, a *security hardware token* is a small, keychain-sized device that you can use to store digital IDs and authentication data. You can access your digital ID by connecting the token to a USB port on your computer or mobile device. The token may include a keypad that lets you type a personal identification number (PIN).

If you store your digital ID on a smart card or hardware token, you must specify that information when you sign or certify documents.

### See also

"Register a digital ID" on page 199

## Change the signing method

You may need to specify a different signing method than the default security method provided in Acrobat.

**1** If necessary, install a third-party signature provider.

**2** Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and click Security on the left.

**3** Click Advanced Preferences, and click the Creation tab.

**4** From the menu in the Creation tab, choose the default method you want for signing and encrypting documents, and click OK.

The menu lists all the security methods installed in the Acrobat plug-ins folder.

## Specify the default digital ID

Before you certify, sign, or encrypt a PDF, you may be prompted to select a digital ID file. To avoid being prompted repeatedly, you can select a digital ID to use every time you sign or certify a document.

**1** Choose Advanced > Security Settings.

**2** Click Digital IDs on the left, and then select the digital ID you want to use as the default.

**3** Click the Usage Options button , and choose a task for which you want the digital ID as the default. If you want to specify the digital ID as the default for two tasks, click the Usage Options button again and select a second option.

A check mark appears next to selected options. If you select only the signing option, the Pen icon appears next to the digital ID. If you select only the encryption option, the Lock icon appears. If you select only the certifying option, or if you select the signing and certifying options, the Blue Ribbon icon appears.

*To clear a default digital ID, repeat these steps, and deselect the usage options you selected.*

## Change a digital ID's password and timeout

Passwords and timeouts can be set for PKCS #12 IDs and Windows Personal Certificates. If the PKCS #12 ID contains multiple IDs, you must configure the password and timeout at the file level.

**1** Choose Advanced > Security Settings.

**2** Expand Digital IDs on the left, select Digital ID Files, and then select a digital ID on the right.

**3** Click the Change Password button. Type the old password and a new password. Confirm the new password, and then click OK.

**4** With the ID still selected, click the Password Timeout button.

**5** Specify how often you want to be prompted for a password:

**Always** Prompts you each time you use the digital ID.

**After** Lets you specify an interval.

**Once Per Session** Prompts you once each time you open Acrobat.

**Never** You're never prompted for a password.

**6** Type the password, and click OK.

## Delete your digital ID

When you delete a digital ID in Acrobat, you delete the actual PKCS #12 file that contains both the private key and the certificate. Before you delete your digital ID, make sure that it isn't in use by other programs or required by any documents for decryption.

***Note:*** *You can delete only self-signed digital IDs that you created in Acrobat.*

1. Choose Advanced > Security Settings.
2. Select Digital IDs on the left, and then select a digital ID on the right.
3. Click Remove ID, and click OK.

### See also

"Delete a certificate from trusted identities" on page 206

## Protecting digital IDs

By protecting your digital IDs, you can prevent unauthorized use of your private keys for signing or decrypting confidential documents. Make sure that you have a procedure in place in the event your digital ID is lost or stolen.

#### How to protect your digital IDs

When private keys are stored on hardware tokens, smart cards, and other hardware devices that are password- or PIN-protected, be sure to use a strong password or PIN. Never divulge your password to others. You should not write your password down, but if you must, store it in a secure location. Keep your password strong by following these rules: Use eight or more characters; mix uppercase and lowercase letters with numbers and special characters; choose a password that is difficult to guess or hack, but that you can remember without having to write it down; do not use a correctly spelled word in any language, as these are subject to "dictionary attacks" that can crack these passwords in minutes; change your password on a regular basis. Contact your system administrator for guidelines on choosing a strong password.

To protect private keys stored in P12/PFX files, use a strong password and set your password timeout options appropriately. If using a P12 file to store private keys that you use for signing, set your password timeout option so that your password is always required (this is the default behavior). If using your P12 file to store private keys that are used to decrypt documents, ensure that there is a backup copy of your private key or P12 file so that you can continue to open encrypted documents should you lose your keys.

The mechanisms used to protect private keys stored in the Windows certificate store vary depending on what company has provided the storage. Contact the provider to determine how best to protect these keys from unauthorized access and for backup purposes. In general, you should use the strongest authentication mechanism available and should seek to require a strong password or PIN when possible.

#### What to do if a digital ID is lost or stolen

If your digital ID was issued by a certificate authority, immediately notify the certificate authority and request the revocation of your certificate. You should also stop using your private key.

If your digital ID was self-issued, destroy the private key and notify anyone to whom you sent the corresponding public key (certificate).

# Sharing and managing certificates

## Sharing certificates with others

Your digital ID includes a certificate that others require to validate your digital signature and to encrypt documents for you. If you know that others will need your certificate, you can send it in advance to avoid delays when exchanging secure documents. Businesses that use certificates to identify participants in signing and secure workflows often store certificates on a directory server that participants can search to expand their list of trusted identities.

If you use a third-party security method, you usually don't need to share your certificate with others. Third-party providers may validate identities using other methods, or these validation methods may be integrated with Acrobat. See the documentation for the third-party provider.

When you receive a certificate from someone, their name is added to your list of trusted identities as a contact. Contacts are usually associated with one or more certificates and can be edited, removed, or reassociated with another certificate. If you trust a contact, you can set your trust settings to trust all digital signatures and certified documents created with their certificate.

You can also import certificates from a certificate store, such as the Windows certificate store. A certificate store may contain numerous certificates issued by different certification authorities.

## Send your certificate to others

**1** Choose Advanced > Security Settings.

**2** Select Digital IDs on the left.

**3** Verify that your certificate information is correct: Select the digital ID you want to share, and click the Certificate Details button . Click OK to return to the Security Settings dialog box.

**4** With the digital ID selected, click the Export button .

**5** Do one of the following:

- Select Email The Data To Someone, and click Next to send your certificate as an FDF file to another user. Type the email address, click Email, and then send the email message that appears in the default email application.
- Select Save The Data To A File, and click Next. Choose a file type from the menu, specify a name and location for the file, and click Save.

## Get certificates from other users

You keep certificates that you receive from other users in a list of trusted identities. This list is like an address book that stores certificates. It lets you validate the signatures of these users on any documents you receive. You can also use the list to encrypt files.

### See also

"Encrypt a PDF and create a recipient list" on page 211

#### Request a certificate from another user

**1** Choose Advanced > Manage Trusted Identities.

**2** Click Request Contact.

**3** Type your name, email address, and contact information.

**4** To allow other users to add your certificate to their list of trusted identities, select Include My Certificates.

**5** Select whether to email the request or save it as a file to email later, and then click Next.

**6** Select the digital ID file to use, and then click Select.

**7** Do one of the following:

- If the Compose Email dialog box appears, type the email address of the person you're requesting a certificate from, and click Email. Send the email message that appears, with the attached certificate, in the default email application.
- If the Export Data As dialog box appears, specify a name and location for the file, click Save, and then click OK.

#### Add a certificate from email

**1** After a user sends you certificate information, open the email attachment in Acrobat, and then click Set Contact Trust in the dialog box that appears.

**2** Select trust options, click OK, and follow the prompts.

#### Add a Windows certificate (Windows only)

This option is recommended if you use the Windows certificate store to organize certificates.

**1** In the Security preferences, click Advanced Preferences.

**2** Click the Windows Integration tab, and select Enable Searching The Windows Certificate Store For Certificates Other Than Yours. Select the desired options, and click OK twice.

**3** Choose Advanced > Manage Trusted Identities.

**4** Click Add Contacts.

**5** Do any of the following:

- If Windows certificate digital IDs are allowed, select the appropriate directory and group.
- If you configured an identity search directory, select the appropriate directory and group. You can then click Search to locate specific certificates.
- Click Browse, select the certificate file, and click Open.

**6** Select the added certificate in the Contacts list to add it to the Certificates list. Select the certificate in the Certificates list, and click Details.

**7** In the Certificate Viewer dialog box, click the Details tab and note the MD5 digest and SHA1 digest values (fingerprint). Contact the certificate's originator to confirm that the values are correct. The certificate should be trusted only if the values are correct. Click OK.

**8** After you verify that the information is correct, click Trust, specify trust options, and click OK.

#### Import certificates using the Windows Certificate Wizard (Windows only)

If you use the Windows certificate store to organize your certificates, you can import certificates using a wizard in Windows Explorer.

**1** In Windows Explorer, right-click the certificate file and choose Install Certificate.

**2** Follow the on-screen instructions to add the certificate to the Windows certificate store.

**3** If you're prompted to validate the certificate before installing it, note the MD5 digest and SHA1 digest values (fingerprint). Contact the certificate's originator to confirm that the values are correct. The certificate should be trusted only if the values are correct. Click OK.

#### Add a certificate using a signature in a PDF

You can safely add a certificate to your trusted identities from a signed PDF by first verifying the fingerprint with the certificate's originator.

**1** Open the PDF containing the user's self-signed signature.

**2** Click the signature in the document to check whether it's valid.

**3** Click Signature Properties, and then click Show Certificate.

**4** In the Certificate Viewer dialog box, click the Details tab and note the MD5 digest and SHA1 digest values (fingerprint). Contact the certificate's originator to confirm that the values are correct. The certificate should be trusted only if the values are correct.

**5** After you verify that the certificate information is correct, click the Trust tab, click Add To Trusted Identities, click OK, specify trust options, and click OK.

## Associate a certificate with a contact

Contacts are typically trusted identities with whom you exchange documents. To exchange encrypted PDFs with a contact, you must associate at least one certificate with that contact.

Adding a contact may or may not add a certificate because certificates aren't necessarily attached to the contact information. Add contact information by browsing to the contact file location or search for the file.

**1** Choose Advanced > Manage Trusted Identities.

**2** Select the contact, and click Details.

**3** Select a name from the list, and click Associate Certificate.

**4** Select a certificate, and click OK. Click OK again.

## Verify information on a certificate

The Certificate Viewer dialog box provides user attributes and other information about a certificate. When other users import your certificate, they may ask you to check your *fingerprint* information against the information they receive with the certificate. (The fingerprint refers to the MD5 digest and SHA1 digest values.) You can check certificate information for your own digital ID files or for ID files that you import.

The Certificate Viewer dialog box provides the validation period in which the certificate is valid, the certificate's intended usage, and certificate data such as a unique serial number and public key method. You can also check if the certificate authority has revoked the certificate. Certificates are typically revoked when an employee leaves the company or when security is compromised in some way.

#### Verify information on your own certificate

**1** Choose Advanced > Security Settings.

**2** Select your digital ID, and then click Certificate Details .

#### Verify information on someone else's certificate

**1** Choose Advanced > Manage Trusted Identities.

2 Select the contact, and click Details.

3 Select the certificate name, and click Show Certificate.

4 Click the Revocation tab, and then click Check Revocation.

The results of the revocation check appear in the Details box.

## Set the trust level of a certificate

You can change the trust settings of certificates. For example, if you have verified the fingerprint in a certificate that you received from someone else, you can change the settings so that you explicitly trust all digital signatures and certified documents created with this certificate. You can even choose to trust the certified document's dynamic content and embedded JavaScript.

A certificate must be explicitly trusted before you can use it to encrypt PDFs for the person associated with that certificate. If you have multiple certificates for a person, set trust levels for at least one of their certificates.

You can also trust a certificate by trusting the root certificate. The root certificate is the originating authority in a chain of certificate authorities that issued the certificate. By trusting the root certificate, you trust all certificates issued by that certificate authority. Exercise caution when trusting root certificates.

1 Choose Advanced > Manage Trusted Identities.

2 Select a contact, and click Details.

3 Select the certificate name, and click Edit Trust.

4 In the Trust tab, select any of the following items to trust this certificate for:

**Signatures And As a Trusted Root** Trusts signatures for this certificate and trusts the certificate as a trusted root so that any other certificates that have this certificate as the root in a certificate chain are also trusted.

**Certified Documents** Trusts documents in which the author has certified the document with an author signature.

**Dynamic Content** Trusts movies, sound files, and other dynamic elements.

**Embedded High Privilege JavaScript** Trusts embedded scripts.

5 Click OK, click OK again, and then click Close.

## Delete a certificate from trusted identities

1 Choose Advanced > Manage Trusted Identities.

2 Choose Certificates from the Display menu.

3 Select the certificate, and click Delete.

# Directory servers

## About directory servers

Directory servers are commonly used as centralized repositories of identities within an organization. As such, the server acts as an ideal location to store user certificates in enterprises that use certificate encryption. Directories help you locate certificates from network servers, including LDAP (Lightweight Directory Access Protocol) servers. After you locate a certificate, you can add it to your list of trusted identities so that you don't have to look it up again. By developing a storage area for trusted certificates, you or a member of your workgroup can facilitate the use of encryption in the workgroup.

## Configure a directory server manually

**1** Choose Advanced > Security Settings.

**2** Select Directory Servers on the left.

**3** Click the New button , type the directory name and server settings, and click OK.

For more information on server settings, contact your system administrator.

## Import and export directory server settings

Administrators and users can export directory settings as a Form Data Format (FDF) file, and use that file to configure the directory server on another computer. As you export the file, you can choose to send it as a signed email attachment.

### Export directory server settings

**1** Choose Advanced > Security Settings.

**2** Select Directory Servers on the left, and select a server on the right.

**3** Click Export.

**4** Select a destination, and click Next.

**5** If you need to verify the information in the FDF file, click Sign, add your signature, and then click Next.

**6** Do one of the following:

- If you're saving the file, specify a name and location for it, and click Save.
- If you're sending the file as an email attachment, type an email address in the To box, click Next, and then click Finish.

### Import directory server settings

**1** Do one of the following:

- Double-click the FDF file.
- Choose Advanced > Security Settings, select Directory Servers on the left, and then click Import. Select the FDF file, and click Open.

**2** If the FDF file is signed, right-click/Control-click the signature and choose options to validate the signature or view signature properties.

**3** Click Import Search Directory Settings.

**4** Click OK if prompted to confirm your choice, and then click Close.

The directory server appears in the Security Settings dialog box.

# Securing PDFs

## Choosing which type of security to use

Acrobat takes advantage of the security features of Windows XP and a number of other security systems. You can secure a PDF by using the following security methods:

***Note:*** *"Security" is sometimes confused with "accessibility," which involves making documents easier to read for the visually impaired.*

**Password encryption** Add passwords and set security options to restrict opening, editing, and printing PDFs.

**Certification encryption** Encrypt a document so that only a specified set of users has access to it.

**Certify a document** Save the PDF as a certified document. Certifying a PDF adds a (visible or invisible) certifying signature that lets the document author restrict changes to the document.

**Server-based security policies** Apply server-based security policies to PDFs (for example, using Adobe LiveCycle Policy Server). Server-based security policies are especially useful if you want others to have access to PDFs for a limited time.

Before you secure a PDF, you may want to remove any sensitive or dynamic page content that can compromise the document's integrity. If others will be filling in, or signing, form fields in the document, you may want to set the form field properties to read-only to prevent modifications to the form fields.

| If you want to do this: | Do this: |
|---|---|
| Require a password to open a PDF, or copy or print its contents | Secure the document by choosing Password Encryption from the Secure button in the Tasks toolbar.<br>If your company is signed up, you can also use Adobe LiveCycle Policy Server to secure documents. |
| Indicate that you approve of the PDF's content | Sign and certify the PDF. You must obtain a digital ID to add digital signatures.<br>For Asian languages, you can add an approval stamp. |
| Prevent forms from being tampered with | Use LiveCycle Designer to secure forms and create locking signature fields. See the Adobe LiveCycle Designer Help. |
| Send secure file attachments via email | Use security envelopes. |
| Allow only the people you specify to view a PDF | Encrypt the document. Choose Certificate Encryption from the Secure button in the Tasks toolbar, or apply security using Adobe LiveCycle Policy Server. You must have certificates for those who can view the documents. |

*If you often apply the same security settings to PDFs, consider creating a security policy to simplify your workflow. Both Adobe LiveCycle Policy Server and certificate encryption let you save settings as a policy.*

### See also

"Removing sensitive content" on page 196

## Securing PDFs in FIPS mode (Windows)

Version 8.1 of Acrobat and Reader provides a FIPS mode to restrict data protection to Federal Information Processing Standard (FIPS) 140-2 approved algorithms using the RSA BSAFE Crypto-C 2.1 encryption module.

The following options aren't available in FIPS mode:

- Applying password-based security policies to documents. You can use public key certificates or Adobe LiveCycle Policy Server to secure the document, but you cannot use password encryption to secure the document.
- Creating self-signed certificates. In FIPS mode, you cannot create self-signed certificates.

In FIPS mode, you can open and view documents that are protected with non-FIPS compliant algorithms, but you cannot save any changes to the document using password security. To apply security policies to the document, use either public key certificates or LiveCycle Policy Server.

#### Configure FIPS mode (Windows)

1 Exit from Acrobat.

2 Choose Start > Run, and then type **regedit** in the Open box.

3 Navigate to the following key in the registry: HKEY_CURRENT_USER>SOFTWARE>Adobe>Adobe Acrobat>8.0>AVGeneral.

4 Right-click AVGeneral, and then select New > DWORD Value.

5 Change the name of the new value to bFIPSMode.

6 In the right pane of the Registry Editor, double-click bFIPSMode.

7 Set the value of bFIPSMode to 1 to enable or 0 to disable FIPS mode.

## Set passwords for PDFs

You can limit access to a PDF by setting passwords and by restricting certain features, such as printing and editing.

A PDF can have two kinds of passwords: a Document Open password and a Permissions password. When you set a Document Open password (also known as a *user* password), anyone who tries to open the PDF must type in the password you specify. When you set a Permissions password (also known as a *master* password), recipients don't need a password to open the document, but they must type the Permissions password to set or change the restricted features. If the PDF is secured with both types of passwords, it can be opened with either password, but only the Permissions password allows the user to change the restricted features. Because of the added security, setting both types of passwords is preferable to setting just one.

All Adobe products enforce the restrictions set by the Permissions password. However, because third-party products may not support or respect these settings, document recipients may be able to bypass some or all of the restrictions you set.

***Important:*** *If you forget a password, there's no way to recover it from the PDF. Consider keeping a backup copy of the PDF that isn't password-protected.*

### See also

"Secure PDFs using policies" on page 217

#### Add a password and security

**1** Click the Secure button in the Tasks toolbar, and choose Password Encrypt.

**2** Click Yes to the prompt about changing the security, and if necessary, type the Permissions password that lets you change security settings. If you don't know the password, contact the author of the PDF.

**3** In the Password Security - Settings dialog box, set the security options as desired, confirm the password, click OK, and then click OK again.

**4** Save the document to apply the security settings.

***Note:*** *You can also restrict editing capabilities when you certify a document, or when you apply a policy to a PDF.*

#### Remove passwords and security settings

You can remove passwords and security policies from an open PDF if you have the permissions to do so. If the PDF is secured with a security policy that resides on a server, the changes can be made only by the author of the policy or by a server administrator.

**1** Do one of the following:

- Click the Secure button in the Tasks toolbar, and choose Remove Security. Type your password, and click Yes to the prompt about removing the security.
- In the Security tab of the Document Properties dialog box, choose No Security from the Security Method menu.

**2** When prompted, specify the Permissions password, and then click OK.

## Security options

You can set the following options when you create a PDF or when you apply password protection to a PDF. Options vary depending on the Compatibility setting. Security options are not available for PDF/X standards or presets.

**Compatibility** Sets the type of encryption for opening a password-protected document. The Acrobat 3 And Later option uses a low encryption level (40-bit RC4), while the other options use a high encryption level (128-bit RC4 or AES). Acrobat 6 And Later lets you enable metadata for searching.

Be aware that anyone using an earlier version of Acrobat cannot open a PDF document with a higher compatibility setting. For example, if you select the Acrobat 7 And Later option, the document cannot be opened in Acrobat 6.0 or earlier.

**Encrypt All Document Contents** Select this option to encrypt the document and the document metadata. If this option is selected, search engines cannot access the document metadata.

**Encrypt All Document Contents Except Metadata** Select this option to encrypt the contents of a document but still allow search engines access to the document metadata.

**Encrypt Only File Attachments** Select this option to require a password for opening file attachments. However, users can open the document without a password.

**Require A Password To Open The Document** Select this option to require users to type the password you specify to open the document. This option is unavailable if Encrypt Only File Attachments is selected.

**Document Open Password** Specify the password that users must type to open the PDF file.

***Note:*** *If you forget a password, there is no way to recover it from the document. It's a good idea to store passwords in a separate secure location in case you forget them.*

**Use A Password To Restrict Editing And Printing Of The Document** Restricts access to the PDF file's security settings. If the file is opened in Adobe Acrobat, the user can view the file but must enter the specified Permissions password in order to change the file's Security and Permissions settings. If the file is opened in Illustrator, Photoshop, or InDesign, the user must enter the Permissions password, since it is not possible to open the file in a view-only mode.

**Permissions Password** Specify a password that is required to change the permissions settings. This option is available only if the previous option is selected.

**Printing Allowed** Specifies the level of printing that users are allowed for the PDF document.

- **None** Prevents users from printing the document.
- **Low Resolution (150 dpi)** Lets users print at no higher than 150-dpi resolution. Printing may be slower because each page is printed as a bitmap image. This option is available only if the Compatibility option is set to Acrobat 5 (PDF 1.4) or later.
- **High Resolution** Lets users print at any resolution, directing high-quality vector output to PostScript and other printers that support advanced high-quality printing features.

**Changes Allowed** Defines which editing actions are allowed in the PDF document.

- **None** Prevents users from making any changes to the document that are listed in the Changes Allowed menu, such as filling in form fields and adding comments.
- **Inserting, Deleting, And Rotating Pages** Lets users insert, delete, and rotate pages, and create bookmarks and thumbnails. This option is only available for high (128-bit RC4 or AES) encryption.
- **Filling In Form Fields And Signing Existing Signature Fields** Lets users fill in forms and add digital signatures. This option doesn't allow them to add comments or create form fields. This option is only available for high (128-bit RC4 or AES) encryption.
- **Commenting, Filling In Form Fields, And Signing Existing Signature Fields** Lets users add comments and digital signatures, and fill in forms. This option doesn't allow users to move page objects or create form fields.
- **Page Layout, Filling In Form Fields, And Signing** Lets users insert, rotate, or delete pages and create bookmarks or thumbnail images, fill out forms, and add digital signatures. This option doesn't allow them to create form fields. This option is only available for low (40-bit RC4) encryption.
- **Any Except Extracting Pages** Lets users edit the document, create and fill in form fields, and add comments and digital signatures.

**Enable Copying Of Text, Images, And Other Content** Lets users select and copy the contents of a PDF.

**Enable Text Access For Screen Reader Devices For The Visually Impaired** Lets visually impaired users read the document with screen readers, but doesn't allow users to copy or extract the document's contents. This option is available only for high (128-bit RC4 or AES) encryption.

## Encrypt a PDF and create a recipient list

To encrypt PDFs, you use *public-key cryptography*. Public-key cryptography uses two keys: a public key, which is stored inside a certificate that can be shared with other users, and a private key, which you don't share with others. The public key (certificate) is used to encrypt documents or to verify digital signatures, and the private key is used to decrypt documents or to create digital signatures. Both keys are included in a *digital ID*.

The advantage of securing documents with certificates is that authors can specify unique permissions for each group in their company. For example, authors can permit employees to sign and fill forms, and permit managers to edit text or remove pages. When you encrypt a PDF using a certificate, you specify a list of recipients and define each recipient's level of access to the file—for example, whether the recipient can edit, copy, or print the file. You can specify certificates from your list of trusted identities, from files on disk, from an LDAP server, or from the Windows certificate store (Windows only). Be sure to include your own certificate in the list so that you are later able to open the document.

***Note:*** *If possible, encrypt documents using certificates from third-party digital IDs. If the certificate is lost or stolen, the issuing authority can replace it. If a self-signed digital ID is deleted, all PDFs that were encrypted using the certificate from that ID are forever inaccessible.*

**1** Do one of the following:

- Click the Secure button in the Tasks toolbar, choose Show Security Properties, and then choose Certificate Security from the Security Method menu. (Use this method if you want to save your settings as a security policy.)
- Choose Advanced > Security > Certificate Encryption.
- Click the Secure button in the Tasks toolbar, and choose Certificate Encryption.

**2** In the Certificate Security Settings dialog box, specify whether to save your settings as a policy or discard them after applying (if available).

**3** Select which document components to encrypt.

**4** From the Encryption Algorithm menu, choose 128-bit AES or 128-bit RC4. If you select 128-bit AES, Adobe Acrobat 7.0 or later or Adobe Reader 7.0 or later is required to open the document. Click Next.

**5** Select the digital ID you want to use.

**6** Create a recipient list for the encrypted PDF: Click Search to locate identities in a directory server or in your list of trusted identities, or click Browse to locate the file that contains certificates.

**7** In the Recipients list, select the recipient(s) for whom you wish to set levels of access, click Permissions, and click OK in the Acrobat Security dialog box. Then select the levels of access. If you don't set permissions, recipients have full access by default.

**8** Click OK to implement your settings, and then click Next. Review your settings and then click Finish.

When a recipient opens the PDF, the security settings you specified for that person are used.

### See also

"About digital IDs" on page 198

"Get certificates from other users" on page 203

## Change or remove encryption from a PDF

You can change or remove security settings from PDF files that you've encrypted.

#### Change encryption settings

**1** Click the Secure button in the Tasks toolbar, and choose Show Security Properties.

**2** Click Change Settings.

**3** Do any of the following, and then click Next.

- To encrypt different document components, select that option.

- To change the encryption algorithm, choose it from the menu.

**4** Do any of the following:

- To check a recipient's trusted identity, select the recipient, and then click Details.
- To remove recipients, select one or more recipients, and then click Remove. Do not remove your own certificate from this list, or you won't have access to the file using that certificate.
- To change recipients' permissions, select one or more recipients, and then click Permissions.

**5** Click Next, and then click Finish. Click OK to close the Document Properties dialog box, and save the document to apply your changes.

#### Remove encryption settings

**1** Click the Secure button in the Tasks toolbar, and choose Remove Security.

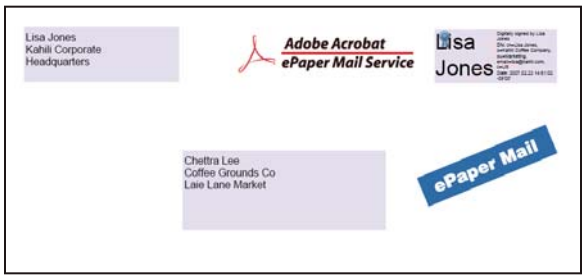
**2** If prompted, type the Permissions password. If you don't know the Permissions password, contact the author of the PDF.

## Create secure attachments

You can add security to any document by embedding it in an encrypted envelope, called a *security envelope* (or *eEnvelope*, in earlier versions) and sending it as an email attachment. This method is especially useful if you want to send a secure file attachment without modifying the attached file. When other users open the security envelope, they can extract the file attachments and save them to disk. The saved files are identical to the original file attachments and are no longer encrypted when saved.

For example, suppose that you want to send several documents, including non-PDF documents, to your accountant, but you don't want anyone else to view the documents. You can embed these documents as file attachments in a security envelope, encrypt the security envelope so that only your accountant can open the attachments, and then email the envelope. Anyone can open the envelope, view its cover page, and even view a list of the contents of that envelope, but only your accountant can view the embedded attachments and extract them to the computer.

When you create a secure attachment, you're prompted to select or create a security policy.




*Embed file attachments in security envelopes for secure transit.*

**1** Click the Secure button in the Tasks toolbar, and choose Create Security Envelope.

**2** Click Add File To Send, select the documents you want to attach, and then click Open. Select any PDFs in the list that you don't want to include and click Remove Selected Files.

**3** Click Next.

**4** Select an envelope template, and click Next.

**5** Select a delivery method, and click Next.

**6** Select Show All Policies, and then select a security policy from the list of available policies (or create a new policy if needed). Click Next.

**7** Follow the on-screen instructions to complete the security envelope. If prompted, provide your identity information.

**8** Type an email address in the message that appears and click Send, or save the security envelope to send later.

### See also

"Secure PDFs using policies" on page 217

# Security policies

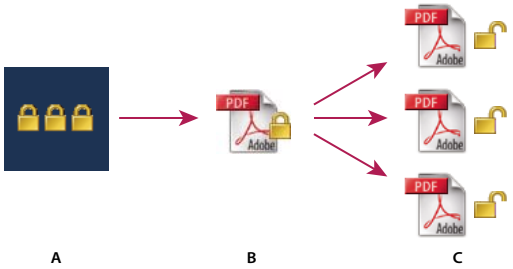
## About security policies

If you often apply the same security settings to multiple PDFs, you can save your settings as a policy that you can reuse. Security policies include the type of security encryption, the permission settings, and information about who can open the PDFs or change security settings. There are two kinds of security policies:

- A *user policy* is developed and applied by an individual user. If you apply the same security settings to various documents, you can save time by creating a user policy and then reapplying the user policy to documents without having to specify the security settings each time. User policies for passwords and public key certificates are stored on your local computer. If you have access to Adobe LiveCycle Policy Server, you can create a user policy that's stored on a policy server and is available only to you.
- An *organizational policy* is created by an Adobe LiveCycle Policy Server administrator and is stored on a policy server to be shared by a group of users. Adobe LiveCycle Policy Server controls access to PDFs and auditing events as defined by the security policy. You can use Adobe LiveCycle Policy Server if your company has licensed the software and made it available to you.

## How organizational policies are authenticated

In addition to allowing the reuse of the same security settings, policies stored on Adobe LiveCycle Policy Server have the added benefit of letting you expire and revoke documents (no matter how many copies were created or distributed), and maintain accountability by auditing users who open protected documents.




*Security policies*
***A.*** *Policies are stored on server.* ***B.*** *Policies are applied to PDF.* ***C.*** *Users can open, edit, and print document only if permitted by policy.*

The process of using server-based security policies involves four main stages:

**Configure the policy server** The system administrator of your company or group usually configures Adobe LiveCycle Policy Server, manages accounts, and sets up organizational policies. For more information on configuring the policy server, see the Adobe website.

**Publish a document with a security policy** An author creates a PDF and applies a policy stored on Adobe LiveCycle Policy Server to the PDF. The policy server generates a license and unique encryption key for the PDF. Acrobat embeds the license in the PDF and encrypts it using the encryption key. The author or administrator can use this license to track and audit the PDF.

**View a document with a policy applied** When users try to open the secure PDF in Acrobat 8.0 (or Reader 8.0), they must authenticate their identities. If the user is granted access to the PDF, the PDF is decrypted and opens with whatever permissions are specified in the policy.

**Administer events and modifying access** By logging in to an Adobe LiveCycle Policy Server account, the author or administrator can track events and change access to policy-secured PDFs. Administrators can view all PDF and system events, modify configuration settings, and change access to policy-secured PDFs. Users may be required to check in the PDF periodically to continue to have access to it.

## Adobe LiveCycle Policy Server

Adobe LiveCycle Policy Server is a server-based security system that provides dynamic control over PDFs. Adobe LiveCycle Policy Server can be configured to run with LDAP, ADS, and other enterprise systems. Policies provided by Adobe LiveCycle Policy Server are stored on the server and can be refreshed from the server. You must connect to Adobe LiveCycle Policy Server to use these server policies.

While security policies are stored on a policy server, the PDFs aren't. However, users may be required to connect to the policy server so that they can open or continue to use PDFs to which a security policy has been applied. For information on configuring an Adobe LiveCycle Policy Server, click Help on the Adobe LiveCycle Policy Server website after you log in to your account.

### Connect to an Adobe LiveCycle Policy Server

1 Choose Advanced > Security Settings.

2 Click Adobe LiveCycle Policy Servers on the left.

3 Click the New button .

4 Type a name in the Name box and the URL in the Server Name box. Add the port number and click Connect To This Server.

5 Type the user name and password for your account, and click OK.

### View Adobe LiveCycle Policy Server policies

1 Click the Secure button in the Tasks toolbar, and choose Adobe Policy Server > Manage My Account.

The Adobe LiveCycle Policy Server page opens in your web browser.

2 If prompted, type your user name and password, and click Login.

3 Click the Policies link on the page.

For more information on using Adobe LiveCycle Policy Server, click the Help link in the upper right corner.

## Create a user security policy

You can create three types of security policies: password security (to password-protect documents), certificate security (to encrypt documents for a list of recipients), and Adobe LiveCycle Policy Server policies. Creating policies for password and certificate security lets you reuse the same security settings for a set of PDFs without having to change security settings for each. The policies for password and certificate security are stored on the local computer.

When you create a user security policy using Adobe LiveCycle Policy Server, the policy is stored on a server, letting you audit actions and change security settings dynamically. You can use Adobe LiveCycle Policy Server if your company has licensed the software and made it available to you.

### See also

"Encrypt a PDF and create a recipient list" on page 211

#### Create a password policy

**1** Choose Advanced > Security > Manage Security Policies.

**2** Click New.

**3** Select Use Passwords, and then click Next.

**4** Type a name and description for the policy, do one of the following, and then click Next:

- If you want to specify passwords and restrictions whenever you apply this policy to a document, deselect Save Passwords With The Policy.
- If you want to save passwords and restriction settings with the policy, select Save Passwords With The Policy.

**5** Specify a compatibility setting and password options. If you selected Save Passwords With The Policy, specify the password and restrictions. Click Next.

**6** Review the policy details, and then click Finish.

#### Create a certificate policy

**1** Choose Advanced > Security > Manage Security Policies.

**2** Click New.

**3** Select Use Public Key Certificates, and then click Next.

**4** Type a name and description for the policy, and specify the document components to encrypt.

**5** If you want to specify recipients whenever you apply this policy to a document, select Ask For Recipients When Applying This Policy, and click Next.

**6** If Ask For Recipients When Applying This Policy is not selected, specify recipients by selecting the digital IDs you want to use to encrypt the document (including your own digital ID), and click Next.

**7** Click Finish.

#### Create a user policy with Adobe LiveCycle Policy Server

When you create a user policy using the Adobe LiveCycle Policy Server, you're redirected to the Adobe LiveCycle Policy Server web page.

**1** Choose Advanced > Security > Manage Security Policies.

**2** Click New.

**3** Select Use The Adobe LiveCycle Policy Server, and click Next.

4 On the Adobe LiveCycle Policy Server web page, click Policies, and then click New.

5 Type a name and description, set the validity period, and any other options.

6 Select the users or groups, set permissions for them, and click OK.

7 Specify the document components you want to encrypt, and whether you want a watermark.

8 When you're done, click Save at the top of the page.

## Manage security policies

After you create security policies, you can manage them by copying, editing, and deleting them. You can also set up a list of favorite policies so that they're easy to access.

1 Choose Advanced > Security > Manage Security Policies.

2 From the Show menu, choose whether you want to display all policies that you have access to, user policies that you've created, or organizational policies.

3 Select a policy and do one or more of the following:

***Note:*** *Options to edit or delete organizational policies aren't available unless you have administrator rights to the Adobe LiveCycle Policy Server. Changes to these policies can be made only on the Adobe LiveCycle Policy Server, which opens automatically when you select an option.*

- To create a new policy, click New.
- To copy an existing policy, click Copy. This option is useful if you want to create a new policy that's based on the settings of an existing policy.
- To edit a policy, click Edit. For password and certificate policies, which are stored on the local computer, editing a policy affects only those documents to which the policy is applied after the policy is edited. For user policies stored on a server, you can edit the permission settings and other options. This option isn't available for organizational policies.
- To delete the policy, click Delete. This option may not be available for organizational policies.
- To make the policy easier to get to, click Favorite. This option adds the selected policy to the Secure menu in the Tasks toolbar, and to the Advanced > Security menu. You can apply the Favorite option to multiple policies.

A star appears next to a favorite policy. (To remove a policy from the favorites, click Favorite again.)

4 Click Close.

## Secure PDFs using policies

You can apply either an organization policy or a user policy to a PDF. You must be online with a connection to your Adobe LiveCycle Policy Server host to apply an Adobe LiveCycle Policy Server policy to a document. Adobe LiveCycle Policy Server security policies must be stored on a policy server, but PDFs to which the policies are applied need not be. You can apply policies to PDFs using Acrobat, server-side batch sequences, or other applications, such as Microsoft Outlook.

To remove a policy from a PDF, you must be the one who applied it. Similarly, only the person who created the user policy can edit it. To edit organizational policies, you must be the policy administrator. For details on editing security policies, click the Secure button in the Tasks toolbar, choose Adobe Policy Server > Manage My Account, and then click Help in the upper right corner.

### See also

"Adobe LiveCycle Policy Server" on page 215

#### Apply a security policy to a PDF

❖ Open a PDF, and do one of the following:

- Click the Secure button in the Tasks toolbar and choose Adobe Policy Server > Refresh Security Policies to ensure that you have access to the most up-to-date server policies. Then, click the Secure button in the Tasks toolbar and choose a policy. Click OK to any warnings about changing the security for the document.

*In the Secure menu, you can identify organizational policies by the Enterprise Policy icon, and user policies by the Personal Policy icon.*

- Choose Advanced > Security > Manage Security Policies. Select a policy, and then click Apply To Document.

#### Apply a policy to attachments in Outlook

You can send different types of files as secure PDF attachments in Microsoft Outlook. This option is available only if Adobe LiveCycle Policy Server is set up and available in Acrobat.

**1** In Outlook, choose File > New > Mail Message.

**2** In the toolbar, click the Attach As Secured Adobe PDF button.

**3** Select the file you want to attach by typing the file path or by clicking Browse.

**4** Specify how you want to secure the document, and click OK.

The file is converted to PDF and encrypted using the security method you choose.

**5** Complete the email message, and then click Send.

#### Remove a user security policy from a PDF

❖ Click the Secure button in the Tasks toolbar, choose Remove Security, and click OK.

## Revoke a policy-protected PDF

If you need to restrict access to a policy-protected PDF that you made available to a group of users, you can revoke the document.

**1** Open the PDF to which you applied the policy, and log in to the Adobe LiveCycle Policy server.

**2** Choose Advanced > Security > Adobe Policy Server > Revoke Document.

**3** From the menu on the web page, choose an option that explains why you're revoking the document or type a message. If you're replacing the revoked document, type the URL location of the new document.

**4** Click OK to save your changes.

# Chapter 9: Digital signatures

You use a digital signature much like a handwritten signature—to approve documents. A digital signature verifies your identity and may include a photo, an image of your handwritten signature, or other personal details that you choose. Document authors can attest to the contents of their documents by adding a certifying signature. If you receive a signed Adobe PDF, status icons let you know if the signature is valid. If a signature is questionable, you can verify it manually.

## Quickstart

The following topics provide overview steps to some common digital signature tasks.

### Create a signature appearance

You can modify your digital signature appearance. For example, you can include your scanned signature.

1. (Optional) Save the desired image on a page by itself, and convert the page to PDF.
2. Choose Edit > Preferences (Windows) or Acrobat (Mac OS) > Preferences, and select Security.
3. Click New, and type a title.
4. (Optional) Select Imported Graphic, click File, and select the desired file.
5. Specify options as desired.

#### See also

"Create the signature appearance" on page 221

### Sign a PDF

Use a digital signature to indicate your approval. For best results, change your security preferences to always sign in Preview Document mode, so that you can view and sign the PDF in a secure state.

1. Click the signature field. Or, click Sign , and choose Sign Document.
2. Follow the on-screen instructions to apply your digital signature.

If the document does not contain an unsigned signature field, click Sign and choose Place Signature to sign the PDF.

#### See also

"Sign a PDF" on page 224

### Certify a PDF

Certifying a PDF indicates that you approve of its content and allows you to specify the types of changes that are permitted for the PDF to remain certified.

1. Click Sign  on the Tasks toolbar, choose Certify With Visible Signature or Certify Without Visible Signature, and click OK.

**2** If certifying with a visible signature, draw a signature field.

**3** Follow the on-screen instructions to apply the certifying signature.

**4** Save the PDF using a different filename.

### See also

"Certify a PDF" on page 226

## Validate signatures

When you open a document, a status icon appears next to the signature, indicating if the signature is valid.

**1** Click Signatures in the navigation pane, and select the signature.

**2** Right-click/Control-click and choose Show Signature Properties.

**3** Use the various tabs and options in the Signature Properties dialog box to resolve any signature issues. For example, if the identity is unknown or unverified, click the Signer tab, and click Show Certificate to determine if the certificate is trusted.

### See also

"Validating signatures" on page 227

# Digital signatures

## About digital signatures

A *digital signature*, like a conventional handwritten signature, identifies the person signing a document. Unlike a handwritten signature, a digital signature is difficult to forge because it contains encrypted information that is unique to the signer and easily verified.

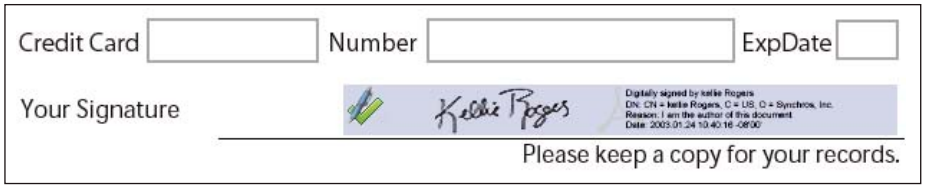
Most digital signatures are referred to as *approval signatures*. Signatures that certify a PDF are called *certifying signatures.* Only the first person to sign a PDF (most often, the author) can add a certifying signature. A certifying signature attests to the contents of the document and allows the signer to specify the types of changes allowed for the document to remain certified. Changes to the document are detected in the Signatures panel.

To sign a document, you must obtain a digital ID or create a self-signed digital ID in Acrobat. The digital ID contains a private key that is used to add the digital signature, and it contains a certificate that you share with those who need to validate your signature.

***Note:*** *You cannot create self-signed digital IDs from within FIPS mode.*

When you apply a digital signature, Acrobat uses a hashing algorithm to generate a message digest, which it encrypts using your private key. Acrobat embeds the encrypted message digest in the PDF, along with details from your certificate, a visual representation of your signature, and a version of the document at the time it was signed.

***Note:*** *For the latest information about digital signatures, choose Help > Online Support > Knowledge Base to open the Adobe Acrobat support page on the Adobe website, and then search for "digital signatures."*




*Valid digital signature in a PDF form*

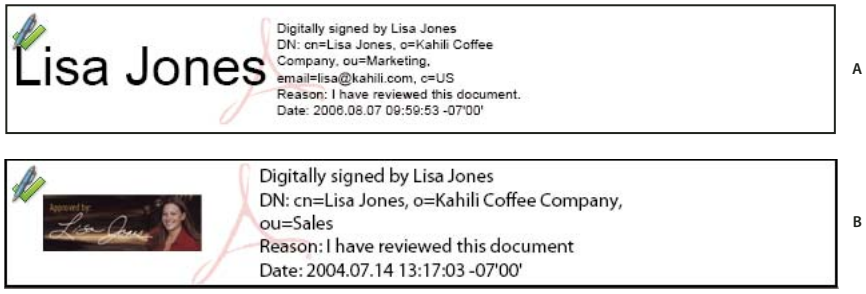
### See also

"About digital IDs" on page 198

## Create the signature appearance

You can set the appearance of your digital signature by selecting options in the Security Preferences. For example, you can include an image of your handwritten signature, a company logo, or a photograph. You can also create alternate signature appearances that you use for different purposes. For some, you may want to provide a greater level of detail.

A signature appearance can also include information that helps others verify your signature, such as certificate revocation status, reasons for signing, contact information, and more. By selecting these preferences, you add options to the Sign Document dialog box that appears each time you sign a PDF.




*Signature formats*
***A.** Text signature **B.** Graphic signature*

**1** If you want to include an image of your handwritten signature in the digital signature, scan your signature and save it as an image file. Place the image in a document by itself, and convert the document to PDF.

**2** Choose Edit > Preferences (Windows) or Acrobat (Mac OS) > Preferences, select Security on the left, and then click New to create a new signature appearance.

**3** In the Configure Signature Appearance dialog box, type a title for the signature appearance. When you sign a document, you select the signature appearance by its title, so use a short, descriptive title.

**4** For Configure Graphic, choose an option:

**No Graphic** Displays only the default digital signature icon and other information specified in the Configure Text section.

**Imported Graphic** Displays an image with your digital signature. Select this option to include an image of your handwritten signature. To import the image file, click File, click Browse, select the image file, click Select, and then click OK (Windows) or Select (Mac OS).

**Name** Displays only the default digital signature icon and your name as it appears in your digital ID file.

**5** For Configure Text, select the options that you want to appear in the signature. Distinguished Name shows the user attributes defined in your digital ID, including your name, organization, and country.

***Important:*** *To include a reason and a location in your signature, you must select those options both in this dialog box and in the Advanced Preferences.*

**6** For Text Properties, specify the writing direction and type of digits (Western or Arabic-Indic) used, and then click OK.

**7** Click Advanced Preferences, click the Creation tab, select any of the following, click OK, and click OK again:

**Include Signature's Revocation Status When Signing** Embeds information about whether your certificate is valid or has been revoked (required for signature validation). Selecting this option speeds the validation process by not having to go online to determine whether the certificate has been revoked.

**Show Reasons When Signing** Adds your reason for signing to the signature field. When you sign a PDF, a menu appears in the Sign Document dialog box from which you can select the option that best describes your reason for signing the PDF.

**Show Location And Contact Information When Signing** Adds your location information to the signature field. Contact information appears in the Signer tab of the Signature Properties dialog box. When you sign a PDF, text boxes appear in the Sign Document dialog box where you can type this information.

**Enable Reviewing Of Document Warnings** Analyzes documents in a signing workflow for content that might change the document appearance and then provides an option in the Sign Document dialog box to review this content. Specify Always, Never, or When Certifying A Document. Available options depend on the Prevent Signing Until Document Warnings Are Reviewed setting.

**Prevent Signing Until Document Warnings Are Reviewed** Enable this option to require the signer to review document warnings before signing or certifying a document. Specify Always, Never, or When Certifying A Document.



*To edit or delete a signature appearance, select it in the Appearance box, and then click Edit or Delete.*

### See also

"Enable right-to-left languages" on page 52

## Customizing signature properties using seed values

*Seed values* offer additional control to document authors by letting them specify which choices a user can make when signing a document. By applying seed values to signature fields in unsigned PDFs, authors can customize options, automate tasks, and specify signature requirements for items such as certificates and timestamp servers. For more information on this topic, go to Acrobat Developer Center and search for the *Acrobat 8.0 Security User Guide*.

## Add a timestamp to signatures

You can include the date and time you signed the document as part of your signature. Like signatures, timestamps are easier to verify when they're associated with a timestamp authority's trusted certificate. Including a timestamp helps to prove that the document wasn't changed after you signed it and reduces the chances of an invalid signature. You can obtain a timestamp from a third-party timestamp authority or from the certificate authority that issued your digital ID.

Timestamps appear in the signature field and in the Signature Properties dialog box. If a timestamp server is configured, that timestamp appears in the Date/Time tab of the Signature Properties dialog box. If no timestamp server is configured, the signatures field displays the local time of the computer at the moment of signing.

#### Configure a timestamp server

To configure a timestamp server, you need the server name and URL or a Forms Data Format (FDF) file that contains the server settings.

1. Choose Advanced > Security Settings.
2. Select Time Stamp Servers on the left.
3. Do one of the following:

- If you have an FDF file with the timestamp server settings, click the Import button . Select the FDF file, and click Open.
- If you have a URL for the timestamp server, click the New button . Type a name and then type the server URL. Specify whether the server requires a user name and password, and then click OK.

#### Set a timestamp server as the default

If you have two or more timestamp servers configured, you can set one of them as the default.

***Note:*** *Before you set a timestamp server as the default, you may want to check if the timestamp authorities charge a usage fee.*

1. Choose Advanced > Security Settings.
2. Select the timestamp server, and click the Set Default button .
3. Click OK to confirm your selection.

### About graphics tablet signatures

You can sign PDFs using graphics tablets and other input devices by using third-party software. Digital signature providers, such as Silanis and the Communication Intelligence Corporation (CIC), provide this capability in an Acrobat supported plug-in. These plug-ins may limit your access of certain encryption features in Acrobat. For more information about third-party providers, visit the Adobe website.

# Signing PDFs

## Before you sign a PDF

You can expedite the signing process and optimize your results by making the following preparations in advance:

- Obtain a digital ID, or create a self-signed digital ID in Acrobat.

***Note:*** *You cannot create self-signed digital IDs from within FIPS mode.*

- Set the default signing method.
- Create an appearance for your digital signature.
- Use Preview Document mode to suppress any dynamic content that may alter the appearance of the document and mislead you into signing something you shouldn't.

- Review all the pages in a document before you sign. Documents may contain signature fields on multiple pages. When you sign one field, your signature appears in all occurrences of the field, whether you approve those pages or not.

### See also

"About digital IDs" on page 198

"Change the signing method" on page 201

## Sign a PDF

You can sign a PDF to indicate your approval. A PDF can be signed more than once and by more than one person. When you sign a document, your digital signature appears in the signature field. The appearance of the signature depends on options you choose. The actual information for your digital signature is embedded in the PDF.

The first person to sign a document (typically the document author) has the option of adding a certifying signature, which allows one to restrict changes to the document.




### Sign a PDF

*For best results, use Preview Document mode to add your signature. See "Sign in Preview Document mode" on page 225.*

**1** Click the signature field, or do one of the following:

- Choose Advanced > Sign & Certify > Sign Document.
- Click the Sign button in the Tasks toolbar and choose Sign Document or Place Signature.

**2** If you chose Place Signature, you're prompted to draw a signature field for your signature.

**3** If you haven't specified a digital ID, you're prompted to find or create one.

**4** In the Sign Document dialog box, choose the digital ID you want to use. If you defined a personalized signature, choose it from the menu.

**5** If you selected advanced digital signature preferences, do any of the following:

- Choose a reason for signing the document.
- Type your location and contact information.
- Review any document warnings about content that may impact signing.

**6** If your digital ID requires a password, type it in the Password box.

**7** Click Sign, and specify a new name for the document so you can make changes to the original PDF without invalidating the signature, and click Save.

#### Sign a PDF in a web browser

To sign a PDF on the web, the document must contain an empty signature field. When you sign a document in a browser, only the incremental portion of the file is saved to your hard drive.

**1** Click a signature field, and then follow the steps to add your digital signature.

**2** To retain a copy of the signed document, click the Save A Copy button in the File toolbar.

## Sign in Preview Document mode

For best results, use the Preview Document feature when you sign documents. This feature analyzes the document for content that may alter the document's appearance, and then suppresses that content, allowing you to view and sign the document in a static and secure state.

When you view a PDF in Preview Document mode, a document message bar lets you know if the PDF complies with the PDF/SigQ Level A and Level B specification. Level A indicates that the document contains no dynamic content that can alter its appearance. Level B indicates that the document contains dynamic content that can be suppressed during signing. If the document doesn't comply with Level A or B, you may want to refrain from signing the document and contact the document author about the problem.

You can also use Preview Document mode outside of a signing workflow to check the integrity of a document.

#### Sign a PDF in Preview Document mode

**1** Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Security on the left.

**2** Select View Documents In Preview Document Mode When Signing, and click OK.

**3** In the PDF, click the signature field, or click the Sign button in the Tasks toolbar and choose Sign Document or Place Signature.

The document message bar appears with the compliance status and options.

**4** (Optional) Click View Report in the document message bar (if available) and select each item in the list to show details. When you're done, close the PDF/SigQ Conformance dialog box.

**5** If you're satisfied with the compliance status of the document, click Sign Document in the document message bar, and add your digital signature.

**6** Save the PDF using a different name than the original, and close the document without making any further changes. If you save the document a second time, your signature must be verified by using the View Signed Version option in the Signatures panel. (See "View previous versions of a signed document" on page 230.)

#### View a PDF in Preview Document mode

**1** Choose Advanced > Sign & Certify > Preview Document.

**2** In the document message bar, click View Report (if available) and select each item in the list to show details. When you're done, click Close, and then click Exit.

## Before you certify a PDF

Document authors can improve document integrity and ensure that their documents remain certified by addressing the following issues before they certify PDFs:

- Disable or remove content that could modify the document or compromise its integrity, such as JavaScripts, actions, or embedded media.
- Certify or sign a PDF only after you make final changes to it. If you make changes or resave the PDF after you sign it, you may compromise the validity of your signature or the document's certified status.

### See also

"Examine a PDF for hidden content" on page 197

## Certify a PDF

When you certify a PDF, you indicate that you approve of its contents. You also specify the types of changes that are permitted for the document to remain certified. For example, suppose that a government agency creates a form with signature fields. When the form is complete, the agency certifies the document, allowing users to change only form fields and sign the document. Users can fill in the form and sign the document, but if they remove pages or add comments, the document doesn't retain its certified status.

You can apply a certifying signature only if the PDF doesn't contain any other signatures. Certifying signatures can be visible or invisible, and are indicated by the blue ribbon icon in the Signatures panel (and if visibly signed, in the signature field). A digital ID is required to add digital signatures (see "About digital signatures" on page 220.)




**1** Change the default signing method, if needed.

**2** Click the Sign button in the Tasks toolbar and choose one of the following options:

- Certify With Visible Signature.
- Certify Without Visible Signature. If you choose this option, your signature appears only in the Signatures panel.

***Note:*** *If you enabled View Documents In Preview Document Mode When Signing in the Security Preferences, click Sign Document in the document message bar.*

**3** Click OK in the Save As Certified Document dialog box.

**4** If you're adding a visible signature, draw the signature field on the page. Follow the on-screen instructions to select a digital ID, if prompted.

*Specify a default ID to avoid being prompted each time you sign a PDF.*

**5** In the Certify Document dialog box, specify the permitted changes, type your password, and then click Sign.

**6** Save the PDF using a different filename than the original file, and then close the document without making additional changes.

### See also

"Change the signing method" on page 201

"Specify the default digital ID" on page 201

"About digital IDs" on page 198

## Clear or remove a digital signature

❖ Do one of the following:

- To remove a signature, right-click/Control-click the signature field and choose Clear Signature Field.
- To remove all signatures in a PDF, choose Clear All Signature Fields from the Options menu in the Signatures panel.

*If you want to delete the signature field, choose Tools > Advanced Editing > Select Object Tool, select the signature field, and press the Delete key.*

# Validating signatures

## Checking the validity of a signature

By default, signatures are validated when you open a PDF. An icon appears in the signature field on the document page to indicate the signature status. Further details about the status appear in the Signatures panel and in the Signature Properties dialog box.

Third-party signature handlers may provide alternate methods of validating signatures. Check the documentation included with your third-party digital ID.

***Important:*** *To ensure that signatures are validated when you open a PDF and that all verification details appear with the signature, set your verification preferences in advance (see "Set signature verification preferences" on page 229).*

- The digital signature icon along with the name of the field in the Signatures panel indicate the presence of an unsigned signature field.
- The blue ribbon icon indicates that the PDF is certified—that is, it contains a valid certifying signature. (Certifying signatures can be visible or invisible.)
- The check mark icon indicates that the signature is valid.
- The red *x* icon indicates that the signature is invalid.
- The caution triangle icon indicates that the document was modified after the signature was added.

- The question mark icon indicates that the signature couldn't be validated because the signer's certificate isn't in your list of trusted identities.

If the signature status is unknown or unverified, or if the document was modified after it was signed, validate the signature manually to determine the problem's cause and possible solution. If the signature status is invalid (indicated by the red *x* icon), contact the signer about the problem.

### See also

"Verify information on a certificate" on page 205

"Get certificates from other users" on page 203

## What makes a digital signature invalid?

A signature can have an invalid status for the following reasons:

- The signer's certificate was revoked.
- The signer's certificate has expired.
- The signer's certificate was removed from the trusted identities list or the trust level changed.
- The PDF was modified after it was signed or certified.

## Validate a signature manually

You can assess the validity of a digital signature by checking the signature properties.

**1** Set your signature verification preferences. For more information, see "Set signature verification preferences" on page 229.

**2** Open the PDF containing the signature, and click the Signatures button on the left to open the Signatures panel.

**3** Select the signature in the Signatures panel, and then choose Validate Signature from the Options menu. The Signature Validation Status describes the validity of the signature.

**4** Click Signature Properties, and do the following:

- If the status is unknown, click the Signer tab, and then click Show Certificate to view the details of the certificate. If you're working with self-signed digital IDs, confirm that the certificate details are valid. If the certificate isn't valid, request a valid certificate from the signer. Click OK.
- Click the Date/Time tab to verify the timestamp, if needed.
- Click the Legal tab to learn more about the legal restrictions of the signature. In the Legal tab, click View Document Integrity Properties to check if the document is PDF/SiqQ-compliant, or if it contains items that could alter its appearance.

If the document was modified after it was signed, check the signed version of the document and compare it to the current version.

### See also

"Validate a timestamp certificate" on page 230

"Sign in Preview Document mode" on page 225

"View previous versions of a signed document" on page 230

## Set signature verification preferences

Before you open signed documents, set your preferences to optimize Acrobat for validating signatures.

**1** Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Security on the left.

**2** To automatically validate all signatures in a PDF when you open the document, select Verify Signatures When The Document Is Opened. This option is enabled by default.

**3** Click Advanced Preferences, and then click the Verification tab.

**4** Choose the following options:

**When Verifying** These options specify methods that determine which plug-in to choose when verifying a signature. The appropriate plug-in is often selected automatically. Contact your system administrator about specific plug-in requirements for validating signatures.

**Require That Certificate Revocation Checking Be Done Whenever Possible During Signature Verification** Select this option to require certificates to be checked against a list of excluded certificates during validation. If this option isn't selected, the revocation status for approval signatures is ignored. The revocation status is always checked for certifying signatures.

**Verify Signatures Using** Select an option to determine whether the time that appears in the digital signature reflects the time the signature was validated (Current Time), the time set by the default timestamp server specified in the Security Settings, or the time the signature was created.

**Hide Signature Field Validity Icon When Signature Is Valid** Hides the signature status if the signature is valid, even if the document has changed since it's been signed (indicated by a green check mark and caution triangle icon).

**5** Click the Windows Integration tab, and specify whether you can import identities from the Windows Certificates feature into the list of trusted identities. In addition, specify whether to trust all root certificates in the Windows Certificates feature when validating signatures and when validating certified documents. Be aware that selecting these options might compromise security.

## Signatures panel overview

The Signatures panel lists all the signatures in the current document. Each signature has an icon identifying its verification status. Verification details are listed beneath each signature and can be viewed by expanding the signature, or by making selections from the Options menu in the Security panel.




*Verify signatures in the Signatures panel.*

### Display the Signatures panel

❖ Choose View > Navigation Panels > Signatures, or click the Signatures button in the navigation pane.

*You can right-click/Control-click a signature field in the Signatures panel to do most signature-related tasks, including adding, clearing, and validating signatures. In some cases, however, the signature field may become locked after you sign it.*

**Expand or collapse a signature**

❖ In the Signatures panel, click the plus sign (Windows) or triangle (Mac OS) next to the signature to expand it. Click the minus sign (Windows) or the rotated triangle (Mac OS) to collapse it.

When collapsed, the signature shows only the name, date, and status.

## Validate a timestamp certificate

If a signature displays the date and time, that time is the local time on the signer's computer. However, a second date and time may appear in the Signature Properties dialog box, indicating that the signer uses a timestamp server. To validate a signature that contains a timestamp, you must obtain the certificate for the timestamp server and add it to your list of trusted identities. Otherwise, the timestamp appears in the Signatures panel as unverified, and you must validate the timestamp manually.

**1** Click the Signatures button in the navigation pane, select the signature, and choose Validate Signature from the Options menu.

**2** Click the Signature Properties button in the Signature Validation Status dialog box.

**3** In the Signature Properties dialog box, click the Date/Time tab to view the timestamp authority, and then click the Show Certificate button. (This button appears in the Date/Time tab only if the signer used a timestamp server.)

**4** In the Certificate Viewer, click the Trust tab to determine if the timestamp certificate is trusted. If it isn't trusted, click Add To Trusted Identities. If a certificate for the timestamp server isn't listed, request one from the signer.

### See also

"Sharing and managing certificates" on page 203

## View previous versions of a signed document

Each time a document is signed, a signed version of the PDF is saved with the PDF. Each version is saved as append-only so that it cannot be modified. All signatures and their corresponding versions can be accessed from the Signatures panel.

**1** In the Signatures panel, select the signature, and choose View Signed Version from the Option menu.

The previous version opens in a new PDF, with the version information and the name of the signer in the title bar.

**2** To return to the original document, choose the document name from the Window menu.

## Compare versions of a signed document

After a document is signed, you can display a list of the changes made to the document after the last version.

**1** In the Signatures panel, select the signature.

**2** Choose Compare Signed Version To Current Version from the Option menu.

**3** When you're done, close the temporary document.

# Chapter 10: Accessibility, tags, and reflow

Accessibility features assist people with disabilities—such as mobility impairments, blindness, and low vision—in their use of Adobe Acrobat and Adobe PDFs.

## Accessibility features

### About accessibility features

A document or application is *accessible* if it can be used by people with disabilities—such as mobility impairments, blindness, and low vision—and not just by people who can see well and use a mouse. Accessibility features in Adobe Acrobat, Adobe Reader, and Adobe Portable Document Format (PDF) make it easier for people with disabilities to use PDF documents and forms, with or without the aid of assistive software and devices such as screen readers, screen magnifiers, and braille printers.

Making PDFs accessible tends to benefit all users. For example, the underlying document structure that makes it possible for a screen reader to properly read a PDF out loud also makes it possible for a mobile device to correctly reflow and display the document on a small screen. Similarly, the preset tab order of an accessible PDF form helps all users—not just users with mobility impairments—fill the form more easily.

Accessibility features in Acrobat and Reader fall into two broad categories: features to make the reading of PDF documents more accessible and features to create accessible PDF documents. To create accessible PDF documents, you must use Acrobat, not Reader.

#### Features for accessible reading of PDFs

- Preferences and commands to optimize output for assistive software and devices, such as saving as accessible text for a braille printer
- Preferences and commands to make navigation of PDFs more accessible, such as automatic scrolling and opening PDFs to the last page read
- Accessibility Setup Assistant for easy setting of most preferences related to accessibility
- Keyboard alternates to mouse actions
- Reflow capability to temporarily present the text of a PDF in a single easy-to-read column
- Read Out Loud text-to-speech conversion
- Support for screen readers and screen magnifiers

#### Features for creating accessible PDFs

- Creation of tagged PDFs from authoring applications
- Conversion of untagged PDFs to tagged PDFs
- Security setting that allows screen readers to access text while preventing users from copying, printing, editing, and extracting text
- Ability to add text to scanned pages to improve accessibility

Though Acrobat Standard provides some functionality for making existing PDFs accessible, you must use Acrobat Professional or Acrobat 3D to perform certain tasks—such as editing reading order or editing document structure tags—that may be necessary to make some PDF documents and forms accessible.

For more information about creating accessible PDFs and using accessibility features to read PDFs, see http://www.adobe.com/go/accessibility.

## About accessible PDFs

Accessible PDFs have the following characteristics.

### Searchable text

A document that consists of scanned images of text is inherently inaccessible because the content of the document is images, not searchable text. Assistive software cannot read or extract the words, users cannot select or edit the text, and you cannot manipulate the PDF for accessibility. You must convert the scanned images of text to searchable text using optical character recognition (OCR) before you can use other accessibility features with the document.

### Fonts that allow characters to be extracted to text

The fonts in an accessible PDF must contain enough information for Acrobat to correctly extract all of the characters to text for purposes other than displaying text on the screen. Acrobat extracts characters to Unicode text when you read a PDF with a screen reader or the Read Out Loud feature, or when you save as text for a braille printer. This extraction fails if Acrobat cannot determine how to map the font to Unicode characters.

### Reading order and document structure tags

To read a document's text and present it in a way that makes sense to the user, a screen reader or other text-to-speech tool requires that the document be structured. Document structure tags in a PDF define the reading order and identify headings, paragraphs, sections, tables, and other page elements.

### Interactive form fields

Some PDFs contain forms that a person is to fill out using a computer. To be accessible, form fields must be interactive—meaning that a user must be able to enter values into the form fields.

### Navigational aids

Navigational aids in a PDF—such as links, bookmarks, headings, a table of contents, and a preset tab order for form fields—assist all users in using the document without having to read through the entire document, word by word. Bookmarks are especially useful and can be created from document headings.

### Document language

Specifying the document language in a PDF enables some screen readers to switch to the appropriate language.

### Security that doesn't interfere with assistive software

Some authors of PDFs restrict users from printing, copying, extracting, adding comments to, or editing text. The text of an accessible PDF must be available to a screen reader. You can use Acrobat to ensure that security settings don't interfere with a screen reader's ability to convert the on-screen text to speech.

### See also

"Recognize text in scanned documents" on page 64

"Set the document language" on page 245

"Prevent security settings from interfering with screen readers" on page 245

## About tags, accessibility, reading order, and reflow

PDF tags are similar in many ways to XML tags. PDF tags indicate document structure: which text is a heading, which content makes up a section, which text is a bookmark, and so on. A logical structure tree of tags represents the organizational structure of the document. Thus tags can indicate the precise reading order and improve navigation—particularly for longer, more complex documents—without changing the appearance of the PDF.

For people who are unable to see or interpret the visual appearance of a document, assistive software can determine how to present and interpret the content of the document by using the logical structure tree. Most assistive software depends on document structure tags to determine the appropriate reading order of text and to convey the meaning of images and other content in an alternate format, such as sound. In an untagged document, there is no such structure information, and Acrobat must infer a structure based on the Reading Order preference setting, which often results in page items being read in the wrong order or not at all.

Reflowing a document for viewing on the small screen of a mobile device relies on these same document structure tags.



*Often, Acrobat tags PDFs when you create them. To determine whether a PDF contains tags, choose File > Properties, and look at the Tagged PDF value in the Advanced pane of the Description tab.*

### See also

"Reading PDFs with reflow and accessibility features" on page 235

"Creating accessible PDFs" on page 241

"Making existing PDFs accessible" on page 245

# Checking the accessibility of PDFs

## About accessibility checkers

Of course, the best way to test the accessibility of a document is to attempt to use the document with the tools that your readers will use. However, even if you don't have a screen reader or braille printer, you can still use any of several methods provided by Acrobat for checking the accessibility of a PDF.

- Use Quick Check to check for document structure tags, searchable text, and appropriate security settings for accessibility. This method is often the best way to check for accessibility before attempting to use a PDF.
- Use Reflow view to quickly check reading order.
- Use Read Out Loud to experience the document as it will be experienced by readers who use this text-to-speech conversion tool.
- Save the document as accessible text and then read the saved text file in a word-processing application to experience the document as it will be experienced by readers who use a braille printer.

***Note:*** *The accessibility checker tools can help to identify areas of documents that may be in conflict with the Adobe interpretation of the accessibility guidelines referenced in the application and its documentation. However, these tools don't check documents against all accessibility criteria, including those in such referenced guidelines, and Adobe doesn't warrant that documents comply with any specific guidelines or regulations.*

### See also

"Reading a PDF with a screen reader" on page 240

"Reflow a PDF" on page 239

"Read a PDF with Read Out Loud" on page 240

"Save as accessible text for a braille printer" on page 239

## Check accessibility with Quick Check

Use Quick Check to examine a PDF to see if it has searchable text, document structure tags, and appropriate security settings to make it accessible.

❖ Press Shift+Ctrl+6/Shift+Command+6.

If the document is unstructured, a message may appear, suggesting that you change reading order preferences.

### See also

"Setting accessibility preferences" on page 235

#### Accessibility Quick Check results

**"This document has logical structure but it is not a Tagged PDF. Some accessibility information may be missing."** Quick Check has found an underlying document structure in the document, so Acrobat will use the available document structure to control the reading order, rather than analyzing the document itself. However, this untagged document structure might be incomplete or unreliable, so assistive software and the accessibility features in Acrobat (such as the Read Out Loud and the Save As Text features) may not read the page properly. If the reading order of the page seems to be wrong, select Override The Reading Order In Tagged Documents in the Reading panel of the Preferences dialog box.

**"This document is not structured, so the reading order may not be correct. Try different reading orders using the Reading Preferences panel."** Quick Check has found no underlying document structure that Acrobat can use for reading order. Acrobat will analyze the reading order of the document using the current analysis method set in the Reading Order preference, but this PDF might not be read correctly by screen readers. If the reading order seems wrong, select a different option for Reading Order in the Reading panel of the Preferences dialog box.

**"No accessibility problems were detected in this quick check. Choose the Full Check command to check more thoroughly."** Quick Check has found that the PDF contains searchable text, is tagged, has an underlying document structure, and has no security settings that prohibit access for screen readers. To check for other types of accessibility problems that may be present in the PDF, use Full Check.

**"This document's security settings prevent access by screen readers."** Quick Check has found that the PDF has security settings that interfere with screen readers' ability to extract text for conversion to speech. You may be able to use a screen reader with this document if your assistive technology product is registered with Adobe as a Trusted Agent. Contact your assistive technology product vendor.

**"This document appears to contain no text. It may be a scanned image."** Quick Check has found that the PDF contains no searchable text, probably because the document consists entirely of one or more scanned images. This

means that screen readers, Read Out Loud, Reflow view, and most other accessibility features—which rely on text as input—will not work with this document.

# Reading PDFs with reflow and accessibility features

## Setting accessibility preferences

Acrobat provides several preferences that help make the reading of PDFs more accessible for visually impaired and motion-impaired users, including preferences that control how PDFs appear on the screen and are read by a screen reader.

Most preferences related to accessibility are available through the Accessibility Setup Assistant, which provides on-screen instructions for setting these preferences. Some preferences that affect accessibility aren't available through the Accessibility Setup Assistant; these include preferences in the Reading, Forms, and Multimedia categories. You can set all preferences in the Preferences dialog box.

The names shown for some preferences in the Accessibility Setup Assistant are different from the names for the same preferences shown in the Preferences dialog box. Acrobat Help uses the names shown in the Preferences dialog box.

For more information about accessibility features in Acrobat and PDF, visit the accessibility page of the Adobe website.

### Set accessibility preferences with the Accessibility Setup Assistant

**1** Start the Accessibility Setup Assistant by doing one of the following:

- Choose Advanced > Accessibility > Setup Assistant.
- (Windows only) Start Acrobat for the first time while a screen reader or screen magnifier is running.

**2** Choose the option that is appropriate for your assistive software and devices.

The assistant presents only preferences that are appropriate for your assistive software and devices, according to the option that you choose.

**3** Follow the on-screen instructions. If you click Cancel at any point, Acrobat uses default settings for the preferences set by the assistant (not recommended).

### Set accessibility preferences with the Preferences dialog box

**1** Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).

**2** Set preferences as appropriate for your assistive software and devices in various panels of the Preferences dialog box.

### Accessibility preferences

#### Accessibility preferences in Accessibility panel

**Replace Document Colors** When this preference is selected, you can choose from a list of contrasting color combinations for text and background, or you can create your own. These settings correspond to the Use High Contrast Colors For Document Text option in the Accessibility Setup Assistant.

**Always Use Page Layout Style** Corresponds to the Override Page Layout Style option in the Accessibility Setup Assistant.

**Always Use Zoom Setting** Corresponds to the Override Document Zoom option in the Accessibility Setup Assistant.

**Use Document Structure For Tab Order When No Explicit Tab Order Is Specified** Improves navigation of form fields and links in documents that don't specify a tab order.

**Always Display The Keyboard Selection Cursor** Select this option if you use a screen magnifier. This preference corresponds to the Always Display The Keyboard Selection Cursor option in the Accessibility Setup Assistant.

### Accessibility preferences in Documents panel

**Automatically Save Document Changes To Temporary File** When deselected, this preference disables the auto-save action. Each time a PDF is saved, the screen reader or magnifier must reload the document. This preference corresponds to the Disable Document Auto-Save option in the Accessibility Setup Assistant.

### Accessibility preferences in Forms panel

**Fields Highlight Color and Required Fields Highlight Color** These preferences specify what colors will be used to highlight fillable form fields. They correspond to the Field Highlight Color and Required Field Highlight Color options in the Accessibility Setup Assistant.

**Auto-Complete** Enables Acrobat to automatically offer to complete some entries in form fields so that filling form fields requires fewer keystrokes. This preference doesn't correspond to an option in the Accessibility Setup Assistant.

### Accessibility preferences in Internet panel

**Display PDF In Browser** Causes PDFs linked to from web pages to open in the web browser instead of a separate Acrobat window. Deselect this preference for greater control when navigating a document in a screen reader. This preference corresponds to the Display PDF Documents In The Web Browser option in the Accessibility Setup Assistant.

### Accessibility preferences in Multimedia panel

- Show Subtitles When Available
- Play Dubbed Audio When Available
- Show Supplemental Text Captions When Available
- Show Audio Description (Or Video Description, Or Descriptive Video) When Available

These preferences don't correspond to any options in the Accessibility Setup Assistant.

### Accessibility preferences in Page Display panel

**Zoom** Sets the on-screen magnification of documents and allows low-vision readers to read reflowed PDFs more easily. This preference corresponds to the Override Document Zoom option in the Accessibility Setup Assistant.

**Smooth Text** Controls anti-aliasing of text. To disable smoothing of text and make text sharper and easier to read with a screen magnifier, choose None. This preference corresponds to the Disable Text Smoothing option in the Accessibility Setup Assistant.

### Accessibility preferences in Reading panel

**Reading Order** Specifies the reading order of documents. The reading order preferences also appear in the Accessibility Setup Assistant.

- **Infer Reading Order From Document (Recommended)** Interprets the reading order of untagged documents by using an advanced method of structure-inference layout analysis.

• **Left-To-Right, Top-To-Bottom Reading Order** Delivers the text according to its placement on the page, reading from left to right and then top to bottom. This method is faster than Infer Reading Order From Document. This method analyzes text only; form fields are ignored and tables aren't recognized as such.

• **Use Reading Order In Raw Print Stream** Delivers text in the order in which it was recorded in the print stream. This method is faster than Infer Reading Order From Document. This method analyzes text only; form fields are ignored and tables aren't recognized as such.

**Override The Reading Order In Tagged Documents** Uses the reading order specified in the Reading preferences instead of that specified by the tag structure of the document. Use this preference only when you encounter problems in poorly tagged PDFs. This preference corresponds to the Override The Reading Order In Tagged Documents option in the Accessibility Setup Assistant.

**Page Vs Document** This preference determines how much of a document is delivered to a screen reader at a time. If a PDF isn't tagged, Acrobat may analyze the document and attempt to infer its structure and reading order, which can take a long time for a long document. You may want to set Acrobat to deliver only the currently visible page so that it analyzes only a small piece of the document at a time. This consideration will vary depending on the size and complexity of the document and on the features of the screen reader. When Acrobat delivers information to a screen reader, screen magnifier, or other assistive software, it loads information into a memory buffer that is directly available to the assistive software. The amount of information that is delivered to the memory buffer can affect how long Acrobat takes to perform tasks, such as opening the document, advancing to the next page, changing views, and carrying out commands.

• **Only Read The Currently Visible Pages** This option is usually best when you use a screen magnifier. It improves performance by eliminating the need for the software to process parts of the document that aren't visible. When Acrobat sends only the currently visible pages of a PDF to the memory buffer, the assistive technology has access to those pages only. It cannot go to another page until the next page is visible and Acrobat has sent the page information to the memory buffer. Therefore, if this option is selected, you must use the navigation features of Acrobat, not those of the assistive technology, to navigate from page to page in the document. You should also set the Default Page Layout option in preferences to Single Page if you choose to have Acrobat send only the currently visible pages to the assistive technology. Because Acrobat sends page information about all visible pages, the assistive technology receives information about pages that may be only partially visible (such as the bottom of one page or the top of the next), as well as those pages that are completely visible. If you use a page display setting other than Single Page, such as Continuous, and then you display the next page, the technology may not correctly track which portion of a previous page it has already read aloud. For instructions on setting the default page layout to Single Page, see "Preferences for viewing PDFs" on page 32.

This option corresponds to the Only Read The Currently Visible Pages option in the Accessibility Setup Assistant.

• **Read The Entire Document** This option can be best if you use a screen reader that has its own navigation and search tools and that is more familiar to you than the tools in Acrobat. This option corresponds to the Read The Entire Document At Once option in the Accessibility Setup Assistant.

• **For Large Documents, Only Read The Currently Visible Pages** This option is selected by default and is usually best if you use a screen reader with long or complex PDFs. It allows Acrobat to deliver an entire small document but revert to page-by-page delivery for large documents. This preference corresponds to the For Large Documents, Only Read The Currently Visible Pages option in the Accessibility Setup Assistant.

**Confirm Before Tagging Documents** When selected, lets the user confirm the options that will be used before Acrobat prepares an untagged document for reading. Tagging can be a time-consuming procedure, especially for larger documents. This preference corresponds to the Confirm Before Tagging Documents option in the Accessibility Setup Assistant.

**Read Out Loud Options** Set preferences in this section to control volume, speed, and pitch of the voice used for Read Out Loud. You can choose to use the default voice or any of the voices provided by your operating system. Select Read Form Fields to have Read Out Loud read the contents of form fields. These preferences don't correspond to options in the Accessibility Setup Assistant.

## Navigate and control the application with the keyboard

You can navigate by using the keyboard instead of the mouse. Several keyboard access features are available on Mac OS; see the documentation for your operating system for details. On Windows, some of the keyboard shortcuts used to navigate in Acrobat may differ from those used in other Windows applications.

When you open Acrobat within a web browser, keyboard commands are mapped to the web browser first. Consequently, some keyboard shortcuts may not be available for Acrobat or may be available only after you shift the focus to the PDF.

For information on accessibility features for navigating Acrobat and PDF documents with the keyboard, visit the accessibility page of the Adobe website.

### See also

"Keys for navigating a PDF" on page 380

"Keys for selecting tools" on page 378

"Keys for editing" on page 379

"Keys for general navigating" on page 381

"Keys for working with navigation panels" on page 382

"Keys for navigating the Help window" on page 383

"Keys for navigating the How To panel" on page 383

#### Enable single-key accelerators

You can select some tools and perform some actions with single-key accelerators. Most keyboard shortcuts in Acrobat don't require that you enable single-key accelerators.

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).

2 Select General, and then select Use Single-Key Accelerators To Access Tools.

***Note:*** *Some screen readers do not work with Acrobat single-key accelerators.*

## Scroll automatically

The automatic scrolling feature makes it easier to scan through long PDFs, especially reflowed documents. You can scroll through pages without using keystrokes or mouse actions.

1 Choose View > Automatically Scroll.

2 Do any of the following:

- To change the scrolling speed to a specific speed, press a number key (9 for fastest, 0 for slowest).
- To increase or decrease the scrolling speed, press the Up Arrow or Down Arrow key, depending on the direction of scrolling.
- To reverse the direction of scrolling, press the minus sign (-) key.

- To jump to the next or previous page, press the Left Arrow or Right Arrow key.

*To stop automatic scrolling, press Esc or choose View > Automatically Scroll again.*

## Save as accessible text for a braille printer

***Note:*** *This document uses the term "braille printer" to refer to any device that is used to convert accessible text to a form that can be used by a person with blindness or low vision.*

You can save a PDF as accessible text to print on a braille printer. Accessible text can be imported and printed out as formatted grade 1 or 2 braille documents by using a braille translation application. See the documentation included with the braille translator for more information.

A text version of a PDF contains no images or multimedia objects, although the text version of an accessible PDF contains alternate text descriptions for such objects.

**1** Choose File > Save As.

**2** Choose Text (Accessible) from the Save As Type (Windows) or Format (Mac OS) menu.

## Reflow a PDF

You can reflow a PDF to temporarily present it as a single column that is the width of the document pane. This reflow view can make the document easier to read on the small screen of a mobile device or on a standard monitor at a large magnification, without the need to scroll horizontally to read each line of text.

You cannot save, edit, or print a document while it is in Reflow view.

In most cases, only readable text appears in the reflow view. Text that doesn't reflow includes forms, comments, digital signature fields, and page artifacts, such as page numbers, headers, and footers. Pages that contain both readable text and form or digital signature fields don't reflow. Vertical text reflows horizontally.

Acrobat temporarily tags an untagged document before reflowing it. As an author, you can optimize your PDFs for reflow by tagging them yourself. Tagging ensures that text blocks reflow and that content follows the appropriate sequences, so readers can follow a story that spans different pages and columns without other stories interrupting the flow.

A quick way to check the reading order of a document is to view it in Reflow view.




*Headings and columns (left) reflow in a logical reading order (right).*

#### Reflow a tagged PDF

❖ Do one of the following:

- Choose View > Zoom > Reflow.
- Press Ctrl+4/Command+4.

If the Page Display setting for the document is Two-Up before you choose Reflow view, the Page Display setting automatically becomes Single Page when the document is reflowed. If the Page Display setting for the document is Two-Up Continuous before you choose Reflow view, the Page Display setting automatically becomes Continuous when the document is reflowed.

#### Return to unreflowed view

❖ When in Reflow view, do one of the following:

- Choose View > Zoom > Reflow.
- Press Ctrl+4/Command+4.

## Reading a PDF with a screen reader

Acrobat supports assistive software and devices—such as screen readers and screen magnifiers—that enable visually impaired users to interact with computer applications. When assistive software and devices are in use, Acrobat may add temporary tags to open PDFs to improve their readability. Use the Accessibility Setup Assistant to improve how Acrobat interacts with the types of assistive software and devices that you use. When using a screen reader, you can change your reading settings for the current document by pressing Shift+Ctrl+5 (Windows) or Shift+Command+5 (Mac OS).

See the documentation for your assistive software or device, or contact the vendor for more information about system requirements, compatibility requirements, and instructions for using this software or device with Acrobat.

## Read a PDF with Read Out Loud

The Read Out Loud feature reads aloud the text in a PDF, including the text in comments and alternate text descriptions for images and fillable fields. In tagged PDFs, content is read in the order in which it appears in the document's logical structure tree. In untagged documents, the reading order is inferred, unless a reading order has been specified in the Reading preferences.

Read Out Loud uses the available voices installed on your system. If you have SAPI 4 or SAPI 5 voices installed from text-to-speech or language applications, you can choose them to read your PDFs.

***Note:*** *Read Out Loud isn't a screen reader, and some operating systems may not support it.*

#### Activate or deactivate Read Out Loud

You must activate Read Out Loud before you can use it. You can deactivate Read Out Loud to free system resources and improve performance of other operations.

❖ Do one of the following:

- Choose View > Read Out Loud > Activate Read Out Loud or press Shift+Ctrl+Y/Shift+Command+Y.
- Choose View > Read Out Loud > Deactivate Read Out Loud or press Shift+Ctrl+Y/Shift+Command+Y.

#### Read a PDF with Read Out Loud

**1** Navigate to the page that you want to read.

**2** Do one of the following:

- Choose View > Read Out Loud > Read This Page Only or press Shift+Ctrl+V/Shift+Command+V.
- Choose View > Read Out Loud > Read To End Of Document or press Shift+Ctrl+B/Shift+Command+B.

#### Read PDF form fields out loud

**1** In the Reading panel of the Preferences dialog box, select Read Form Fields in the Read Out Loud Options section.

**2** In the PDF form, press Tab to select the first form field.

**3** Make entries and selections as needed, and then press Tab to move to the next field, repeating this step until the form is completed. Acrobat reads the state of selected check boxes and radio buttons.

#### Interrupt reading out loud

❖ Do one of the following:

- Choose View > Read Out Loud > Pause or press Shift+Ctrl+C/Shift+Command+C.
- Choose View > Read Out Loud > Stop or press Shift+Ctrl+E/Shift+Command+E.

### About operating system accessibility tools

#### Accessibility tools in Windows

Windows 2000, XP, and Vista operating systems have built-in tools that provide increased or alternate access to information on the computer screen. Narrator is a light version of a screen reader. Magnifier is a screen magnification tool.

For more information on the accessibility tools in the Windows 2000, XP, or Vista operating systems, visit the Microsoft accessibility website at http://www.microsoft.com/enable.

#### Accessibility tools in Mac OS

Mac OS X has built-in tools that provide increased or alternate access to information on the computer screen.

For more information on the accessibility tools in the Mac OS X operating system, visit the Apple Computer, Inc. accessibility website at http://www.apple.com/accessibility.

# Creating accessible PDFs

## Workflow for creating accessible PDFs

At a high level, the process of creating accessible PDFs consists of a few basic stages:

1. **Consider accessibility before you convert a document to PDF.**

2. **Tag the PDF.**

3. **Add other accessibility features to the PDF.**

4. **Evaluate the PDF and repair tagging problems.**

Though these stages are presented in an order that suits most needs, you may perform tasks in these stages in a different order or iterate between some of the stages. In all cases, you should first examine the document, determine its intended purpose, and use that analysis to determine the workflow that you apply.

5. **Consider accessibility before you convert a document to PDF.**

Whenever possible, think about accessibility when you create the source files in an authoring application, such as a word-processing or page-layout application.

Typical tasks to do in the authoring application include adding alternate text to graphics, optimizing tables, and applying paragraph styles or other document-structure features that can be converted to tags. For more information, see "Creating a tagged PDF from an authoring application" on page 243.

6. **Tag the PDF.**

Improve the accessibility of PDFs by adding tags in Acrobat. If a PDF doesn't contain tags, Acrobat may attempt to tag it automatically when users read or reflow it, and the results may be disappointing. If you provide users with a tagged PDF, the logical structure tree sends the contents to a screen reader or other assistive software or hardware in an appropriate order.

For best results, tag a document when converting it to PDF from an authoring application. Alternatively, you can tag a PDF any time in Acrobat.

Tagging during conversion to PDF requires an authoring application that supports tagging in PDF. Tagging during conversion enables the authoring application to draw from the source document's paragraph styles or other structural information to produce a logical structure tree that reflects an accurate reading order and appropriate levels of tags. This tagging can more readily interpret the structure of complex layouts, such as embedded sidebars, closely spaced columns, irregular text alignment, and tables. Tagging during conversion can also properly tag the links, cross-references, bookmarks, and alternate text (when available) that are in the file.

To tag a PDF in Acrobat, use the Add Tags To Document command. This command works on any untagged PDF, such as one created with Adobe PDF Printer. Acrobat analyzes the content of the PDF to interpret the individual page elements, their hierarchical structure, and the intended reading order of each page, and then builds a tag tree that reflects that information. It also creates tags for any links, cross-references, and bookmarks that you added to the document in Acrobat.

Though the Add Tags To Document command adequately tags most standard layouts, it cannot always correctly interpret the structure and reading order of complex page elements, such as closely spaced columns, irregular text alignment, nonfillable form fields, and tables that don't have borders. Tagging these pages by using the Add Tags To Document command can result in improperly combined elements or out-of-sequence tags that cause reading order problems in the PDF.

7. **Add other accessibility features to the PDF.**

This stage includes setting the document language, making sure that security settings don't interfere with screen readers, and adding bookmarks. For more information, see "Set the document language" on page 245, "Prevent security settings from interfering with screen readers" on page 245, and "About bookmarks" on page 251.

## Create a tagged PDF from a web page

A PDF that you create from a web page is only as accessible as the HTML source that it is based on. For example, if the web page relies on tables for its layout design (as many web pages do), the HTML code for the table may not flow in the same logical reading order as a tagged PDF would require, even though the HTML code is sufficiently structured to display all the elements correctly in a browser.

To produce the most accessible PDFs from web pages you create, first establish a logical reading order in their HTML code. For best results, employ the Web Content Accessibility Guidelines that are published by the World Wide Web Consortium (W3C). The guidelines are available on the W3C website at www.w3.org.

1. Choose File > Create PDF > From Web Page.
2. For URL, type the address of the web page, or navigate to the web page location.
3. Click Settings.
4. In the General tab, select Create PDF Tags, and then click OK.
5. Select any other options as appropriate, and then click Create.

## Creating a tagged PDF from an authoring application

In most cases, you create tagged PDFs from within an authoring application, such as Adobe FrameMaker®, Adobe InDesign, or Microsoft Word. Creating tags in the authoring application generally provides better results than adding tags in Acrobat.

PDFMaker provides conversion settings that let you create tagged PDFs in Microsoft Excel, PowerPoint, and Word.

For an in-depth guide to creating accessible PDFs, visit the accessibility page of the Adobe website.

For more information, see the documentation for your authoring application.

## About tags in combined PDFs

You can combine multiple files from different applications in one operation to create a single PDF. For example, you can combine word-processing files with slide presentations, spreadsheets, and web pages.

During conversion, Acrobat opens each authoring application, creates a tagged PDF, and assembles these PDFs into a single tagged PDF.

The conversion process doesn't always correctly interpret the document structure for the combined PDF, because the files being assembled often use different formats. Because you may need to modify the reading order and tag tree of the combined document, you may need to use Acrobat Professional or Acrobat 3D to create an accessible PDF from multiple documents.

When you combine multiple PDFs into one tagged PDF, start with all untagged PDFs or all tagged PDFs. Combining tagged and untagged PDFs results in a partially tagged PDF that isn't accessible to people with disabilities; some users—such as those using screen readers—will be completely unaware of the pages that don't have tags. If you start with a mix of tagged and untagged PDFs, tag the untagged files before proceeding. If the PDFs are all untagged, add tags to the combined PDF after you finish inserting, replacing, and deleting pages.

Keep in mind that when you insert, replace, or delete pages, Acrobat accepts existing tags into the tag tree of the consolidated PDF in the following manner:

- When you insert pages into a PDF, Acrobat adds the tags (if any) for the new pages to the end of the tag tree, even if you insert the new pages at the beginning or the middle of the document.

- When you replace pages in a PDF, Acrobat adds the tags (if any) from the incoming pages to the end of the tag tree, even if you replace pages at the beginning or the middle of the document. Acrobat retains the tags (if any) for the replaced pages.
- When you delete pages from a PDF, Acrobat retains the tags (if any) of the deleted pages.

Pages whose tags are out of order in the logical structure tree can cause problems for screen readers. Screen readers read tags in sequence down the tree, and therefore they might not reach the tags for an inserted page until the end of the tree. To fix this problem, you'd use Acrobat Professional or Acrobat 3D to rearrange the tag tree to put large groups of tags in the same reading order as the pages themselves. To avoid the need for this advanced step, plan so that you always insert pages to the end of a PDF, building the document from front to back in sequence. For example, if you create a title page PDF separately from the PDF that contains the body of the text, add the body PDF to the title page PDF, even though the body document is much larger to process. This approach puts the tags for the body of the text after the tags for the title page, and eliminates the need for you to rearrange the tags later in Acrobat Professional or Acrobat 3D.

The tags that remain from a deleted or replaced page don't connect to any content in the document. Essentially, they are large pieces of empty tag tree sections. These unneeded tags increase the file size of the document, slow down screen readers, and can make screen readers present confusing results. You should use Acrobat Professional or Acrobat 3D to delete the tags of deleted pages from the tag tree.

For more information, see "Create merged PDFs and PDF packages" on page 114.

## About tools for creating accessible PDF forms

Adobe offers several tools for the creation of accessible PDF forms:

**Acrobat Professional or Acrobat 3D** Use either application to open untagged or tagged PDF forms (except PDF forms that are created from LiveCycle Designer) to add fillable form fields, such as text boxes, check boxes, and buttons. Then use the application's other tools to make the form accessible by adding descriptions to form fields, tagging untagged forms, setting the set tab order, manipulating tags, and performing the other PDF accessibility tasks.

**Adobe PDF Forms Access** Use this tool to open and tag untagged PDF forms that you created by using Acrobat Professional or Acrobat 3D, and to manipulate the tags of these forms. You can then open the tagged PDF in Acrobat Professional or Acrobat 3D and perform other accessibility tasks. If you often process complex untagged PDF forms, consider purchasing Adobe PDF Forms Access. Its tagging feature is optimized for interpreting forms content, and its tags editor is much easier to use than the tags editor in Acrobat Professional or Acrobat 3D for correcting tagging problems in forms.

**LiveCycle Designer** (Available in Acrobat Professional and Acrobat 3D) Use this product to design and build new forms or to import untagged PDF forms and make their form fields fillable and accessible. You can deploy forms in tagged PDF, XML, and other formats from LiveCycle Designer. Once you create or edit an Acrobat form in LiveCycle Designer, it becomes a LiveCycle Designer file—it is no longer a PDF that you can edit or manipulate in Acrobat. Both Acrobat and Reader can open and read PDF forms that you create from LiveCycle Designer. These PDF forms, however, don't include permissions to modify the file. You should therefore use LiveCycle Designer only for PDFs that are intended to contain only form-based information. Don't use it to add form fields to a document that combines pages of narrative with an occasional page that has form fields. In this case, you should use Acrobat Professional or Acrobat 3D to add the form fields and then complete the accessibility tasks for the rest of the document's content.

**Authoring applications** Most authoring applications that you can use to design forms don't retain their fillable form fields when you convert the files to PDF. You therefore need to use the forms tools in Acrobat Professional or Acrobat 3D to add fillable form fields. Moreover, if you tag the form during conversion to PDF, the authoring application may

generate inappropriate tags for the text labels of the form fields. In a complex form, for instance, the text labels for all the fields may run together into a single line that screen readers can't interpret as individual labels. Such reading order problems can require time-consuming work in Acrobat Professional or Acrobat 3D to split the labels apart. In this case, producing an untagged PDF form from the authoring application is sometimes the better course. You can then use the Forms tools in Acrobat Professional or Acrobat 3D to add fillable form fields before you tag the entire document. Some forms, however, are straightforward enough that you can produce a tagged PDF from the authoring application and do only light touchup in Acrobat Professional or Acrobat 3D after you add the fillable form fields.

# Making existing PDFs accessible

## Add tags to an existing PDF

Creating a tagged document directly from an authoring application is the best way to make PDFs accessible. However, if a PDF was created without tags, you can add them using Add Tags To Document.

**1** Open the PDF.

**2** Choose Advanced > Accessibility > Add Tags To Document.

***Note:*** *The Add Tags To Document command removes any tags that were in the document before the command was run.*

## Set the document language

Setting the document language in a PDF enables some screen readers to switch to the appropriate language. You can set the document language for an entire document with Acrobat Professional, Acrobat 3D, or Acrobat Standard. You can set the document language for specific portions of a multilanguage document with Acrobat Professional or Acrobat 3D.

- To set the language for an entire document, choose File > Properties, and select a language from the Language menu in the Reading Options area of the Advanced tab.
- To set the language for an entire document to a language not in the Language menu, choose File > Properties, and enter the ISO 639 code for the language in the Language field in the Reading Options area of the Advanced tab. For more information, see the ISO Language Codes on http://www.loc.gov/standards.

## Prevent security settings from interfering with screen readers

A document author can specify that no part of an accessible PDF is to be copied, printed, extracted, commented on, or edited. This setting could interfere with a screen reader's ability to read the document, because screen readers must be able to copy or extract the document's text in order to convert it to speech.

To maintain document security while allowing screen readers access to text, use one of the following settings:

- For low-encryption-level security, select Enable Copying Of Text, Images, And Other Content in the Password Security - Settings dialog box.
- For high-encryption-level security, select Enable Text Access For Screen Reader Devices For The Visually Impaired in the Password Security - Settings dialog box. This option overrides the document's security settings only for the purpose of giving assistive software, such as screen readers, access to the content.

For instructions on how to set document security, see "Set passwords for PDFs" on page 209.

If your assistive technology product is registered with Adobe as a Trusted Agent, you can read PDFs that might be inaccessible to another assistive technology product. Acrobat recognizes when a screen reader or other product is a Trusted Agent and overrides security settings that would typically limit access to the content for accessibility purposes. However, the security settings remain in effect for all other purposes, such as to prevent printing, copying, extracting, commenting, or editing text.

## About watermarks and screen readers

You can add a watermark to a tagged PDF without also adding it to the tag tree. Not having the watermark appear in the tag tree is helpful for people who are using screen readers, because they won't hear the watermark read as document content.

The best way to add a watermark that doesn't interfere with screen readers is to insert an untagged PDF of the watermark into a tagged PDF.

### See also

"Add and edit watermarks" on page 123

# Chapter 11: Editing PDFs

It's a fact that Adobe PDF is unlike other document formats, in which you can freely copy, paste, and move text and images on a page. Instead, consider a PDF as a snapshot of your original file. Use Adobe Acrobat to touch up and enhance the file for readability and distribution, and reserve more substantial revisions for your source application.

## Quickstart

The following topics provide quick steps to some common PDF editing tasks.

### Add a bookmark

You can add navigation to a PDF with bookmarks.

1. Open to the desired page and adjust the view settings.
2. (Optional) To bookmark text, select the desired text.
3. Click the Bookmarks button in the navigation pane, and choose New Bookmark from the Options menu.
4. Type or edit the bookmark name.

You can also add bookmarks to specific portions of a page, such as an image or a table, or to another PDF.

#### See also

"Create a bookmark" on page 251

### Add a link

Links take you to other locations in the same document, to other documents, or to websites. They can also trigger actions, such as playing a sound or movie file or submitting a form.

1. Choose Tools > Advanced Editing > Link Tool.
2. Drag a rectangle where you want to create a link.
3. In the Create Link dialog box, choose the desired link appearance and action.
4. Follow the on-screen instructions to create the link.

#### See also

"Create a link" on page 255

### Attach files to a PDF

You can attach many types of files to a PDF.

1. Choose Document > Attach A File.
2. Select the file you want to attach, and click Open.

**3** (Optional) To add a description to distinguish the file from similar attachments, select the file in the Attachment panel, and choose Options > Edit Description.

You can also collect files into a PDF package or merge files into a single PDF.

### See also

"Add an attachment" on page 258

## Edit text

You can add or replace small amounts of text in a PDF if the font is installed on the system. Otherwise, you can edit text attributes only. For extensive changes, edit the original document from which the PDF was created.

**1** Choose Tools > Advanced Editing > TouchUp Text Tool.

**2** Select the text you want to edit.

**3** Type to replace text, or press Delete to remove text.

If you cannot edit text, the document may have security restrictions.

### See also

"Edit text" on page 267

## Format text

You can change text attributes such as font and font size, color, character and word spacing, baseline offset, and horizontal scaling.

**1** Choose Tools > Advanced Editing > TouchUp Text Tool.

**2** Click in the text you want to edit, and then right-click/Control-click and choose Properties.

**3** Change text attributes as desired.

If the necessary font is installed on the system, you can also use the TouchUp Text tool to edit the text.

### See also

"Edit text" on page 267

## View object metadata

You can view the metadata information of certain images, tags, and objects. Do one of the following:

- For an object, choose Tools > Advanced Editing > TouchUp Object Tool. Right-click/Control-click the object, and choose Show Metadata. (If the command isn't available, the object has no metadata.)
- For a Visio object, choose Tools > Object Data > Object Data Tool. Double-click the object to view its metadata in the Model Tree.

### See also

"View object data and metadata" on page 276

### View content on layers

To view information stored on different layers of a PDF, use the Layers panel.

1 Click the Layers button in the navigation pane.

2 Click the eye icon to hide a layer's content. Click the empty box to show a layer's content.

To save a different view of a layered PDF, you must change the default state of the layers in the Layer Properties dialog box.

### See also

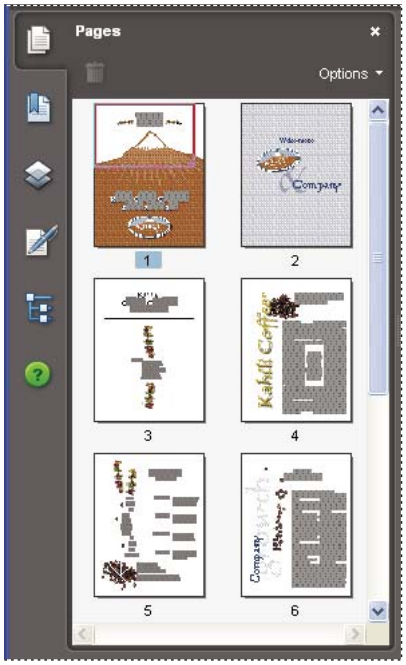
"Show or hide layers" on page 277

# Page thumbnails and bookmarks

## About page thumbnails

*Page thumbnails* are miniature previews of the pages in a document. You can use page thumbnails in Acrobat to jump quickly to a selected page or to adjust the view of the page.

When you move, copy, or delete a page thumbnail, you actually move, copy, or delete the corresponding page.




## Create page thumbnails

Because page thumbnails increase file size, they are not automatically created. After you create page thumbnails, you can embed them in the PDF. Embedding prevents the page thumbnails from redrawing each time you click the Pages button, often a time-consuming process. Embedded page thumbnails won't reflect changes that you make to document pages until you unembed the page thumbnails.

## See also

"PostScript options" on page 334

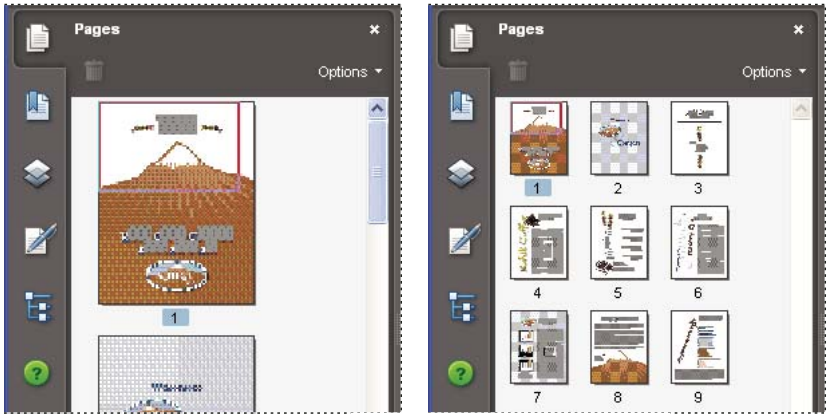
### Create page thumbnails

❖ Click the Pages button on the left.

Page thumbnails appear in the navigation pane. This process may require several seconds, particularly in larger documents. The drawing of page thumbnails may pause if you interact with the application during this process.

### Resize page thumbnails

❖ In the Pages panel, choose Reduce Page Thumbnails or Enlarge Page Thumbnails from the Options menu.




### Embed or unembed page thumbnails in a PDF

❖ In the Pages panel, choose Embed All Page Thumbnails or Remove Embedded Page Thumbnails from the Options menu.

## Define the tabbing order

In the Pages panel, you can set the order in which a user tabs through form fields, links, and comments for each page.

**1** Click the Pages button on the left.

**2** Select a page thumbnail, and choose Page Properties from the Options menu.

**3** In the Page Properties dialog box, click Tab Order, and select the tab order:

**Use Row Order** Moves through rows from left to right, or right to left for pages with a right-to-left binding.

**Use Column Order** Moves through columns from left to right and from top to bottom, or right to left for pages with a right-to-left binding.

**Use Document Structure** Moves in the order specified by the authoring application.

***Note:*** *For structured documents—PDFs that were created from desktop publishing applications or that contain tags—it's best to select the Use Document Structure option to match the intention of the authoring application.*

If the document was created in an earlier version of Acrobat, the tab order is Unspecified by default. With this setting, form fields are tabbed through first, followed by links and then comments ordered by row.

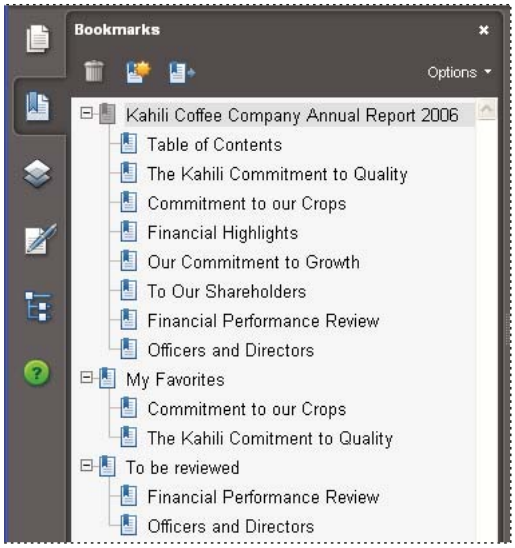
## About bookmarks

A *bookmark* is a type of link with representative text in the Bookmarks panel in the navigation pane. Each bookmark goes to a different view or page in the document. Bookmarks are generated automatically during PDF creation from the table-of-contents entries of documents created by most desktop publishing programs. These bookmarks are often tagged and can be used to make edits in the PDF.

Initially, a bookmark displays the page that was in view when the bookmark was created, which is the bookmark's *destination*. Although you can set bookmark destinations as you create each bookmark, it is sometimes easier to create a group of bookmarks, and then set the destinations later.

You can use bookmarks to mark a place in the PDF to which you want to return, or to jump to a destination in the PDF, another document, or a web page. Bookmarks can also perform actions, such as executing a menu item or submitting a form.

***Note:*** *A user can add bookmarks to a document only if the security settings allow it.*




*Bookmarks act as a table of contents for some PDFs.*

### See also

"About tags, accessibility, reading order, and reflow" on page 233

## Create a bookmark

**1** Open the page where you want the bookmark to link to, and adjust the view settings.

**2** Use the Select tool to create the bookmark:

- To bookmark a single image, click in the image, or drag a rectangle around the image.
- To bookmark a portion of an image, Ctrl-drag/drag a rectangle around the portion.
- To bookmark selected text, drag to select it. The selected text becomes the label of the new bookmark. You can edit the label.

**3** Click the Bookmarks button, and select the bookmark under which you want to place the new bookmark. If you don't select a bookmark, the new bookmark is automatically added at the end of the list.

**4** Choose New Bookmark from the Options menu, or click the New Bookmark icon at the top of the Bookmarks panel.

**5** Type or edit the name of the new bookmark, and press Enter/Return.

## Edit a bookmark

You can change a bookmark's attributes at any time.

### See also

"Action types" on page 261

#### Rename a bookmark

❖ Select the bookmark in the Bookmarks panel, choose Rename Bookmark in the Options menu, and type the new bookmark name.

#### Wrap text in a long bookmark

❖ Click the Bookmarks button, and choose Wrap Long Bookmarks from the Options menu.

All the text of long bookmarks shows regardless of the width of the navigation pane. (This option is on when checked, and off when not checked.)

#### Change the text appearance of a bookmark

You can change the appearance of a bookmark to draw attention to it.

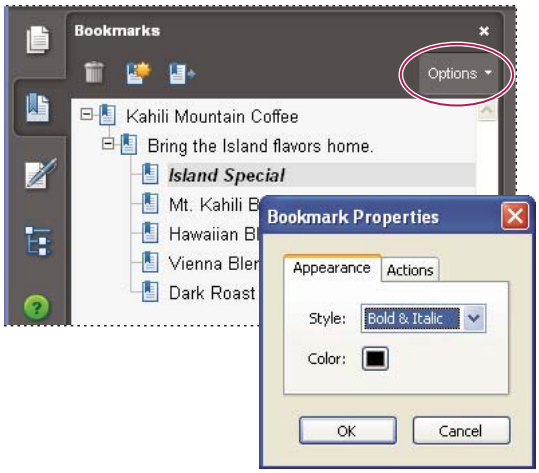
**1** In the Bookmarks panel, select one or more bookmarks.

**2** Change the color and style of the text by doing one of the following:

- Choose View > Toolbars > Properties Bar to open the Properties toolbar.
- Right-click/Control-click the bookmark, and select Properties. Click the Appearance tab.

*After you have defined a bookmark's appearance, you can reuse the appearance settings by selecting the bookmark and choosing the Use Current Appearance As New Default command from the bookmark's context menu.*

**3** To change the font size, click the Options menu, and choose Text Size > [*size*].




*Set a bookmark's appearance in the Bookmark Properties dialog box.*

### Change a bookmark's destination

1 Click the Bookmarks button, and select the bookmark.

2 In the document pane, move to the location you want to specify as the new destination.

3 If necessary, adjust the view magnification.

4 Choose Set Bookmark Destination in the Options menu.

### Add an action to a bookmark

1 Click the Bookmarks button.

2 Right-click/Control-click a bookmark, and choose Properties.

3 In the Bookmark Properties dialog box, click Actions.

4 Choose an action from the Select Action menu, and click Add.

### Delete a bookmark

1 Click the Bookmarks button, and select the bookmark or range of bookmarks you want to delete.

2 Choose Delete Bookmark(s) in the Options menu.

***Important:*** *Deleting a bookmark deletes any bookmarks that are subordinate to it. Deleting a bookmark does not delete any document text.*

## Create a bookmark hierarchy

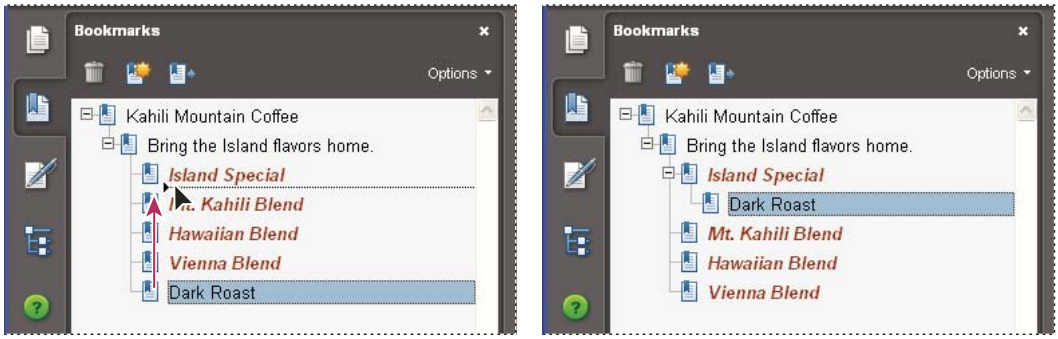
You can nest a list of bookmarks to show a relationship between topics. Nesting creates a parent/child relationship. You can expand and collapse this hierarchical list as desired.

### Nest one or more bookmarks

1 Select the bookmark or range of bookmarks you want to nest.

2 Drag the icon or icons directly underneath the parent bookmark icon. The Line icon shows the position of the icon or icons.

The bookmark is nested; however, the actual page remains in its original location in the document.



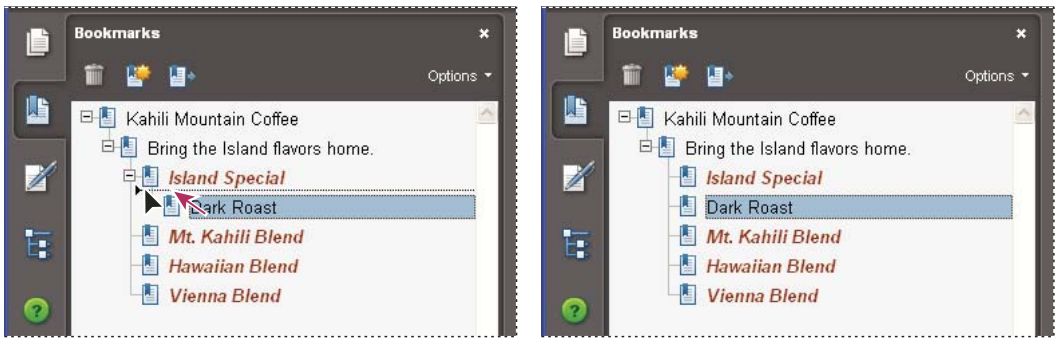

*Nesting a bookmark (left), and the result (right)*

### Move bookmarks out of a nested position

1 Select the bookmark or range of bookmarks you want to move.

**2** Move the selection by doing one of the following:

- Drag the icon or icons, positioning the arrow directly under the label of the parent bookmark.
- Choose Cut from the Options menu, select the parent bookmark, and then choose Paste Under Selected Bookmark from the Options menu.




*Moving a bookmark out of its nested position (left), and the result (right)*

### Expand or collapse a bookmark

Do one of the following:

- Click the plus sign (+) or horizontal triangle next to the bookmark icon to show any children. Click the minus sign (-) or inverted triangle to collapse the list again.
- Select the bookmark, and choose Expand Current Bookmark from the Options menu.

### Expand or collapse all top-level bookmarks

❖ From the Options menu, choose Expand Top-Level Bookmarks or Collapse Top-Level Bookmarks.

## Add tagged bookmarks

Tagged bookmarks give you greater control over page content than do regular bookmarks. Because tagged bookmarks use the underlying structural information of the document elements (for example, heading levels, paragraphs, table titles), you can use them to edit the document, such as rearranging their corresponding pages in the PDF, or deleting pages. If you move or delete a parent tagged bookmark, its children tagged bookmarks are moved or deleted along with it.

Many desktop publishing applications, such as Adobe InDesign and Microsoft Word, create structured documents. When you convert these documents to PDF, the structure is converted to tags, which support the addition of tagged bookmarks. Converted web pages typically include tagged bookmarks.

If your document doesn't include tags, you can always add them in Acrobat.

**1** Click the Bookmarks button, and choose New Bookmarks From Structure from the Options menu. (If this option isn't available, the document isn't structured.)

**2** Select the structure elements you want specified as tagged bookmarks. Ctrl-click/Command-click to add to the selection.

The tagged bookmarks are nested under a new, untitled bookmark.

### See also

"Links and bookmarks in web pages" on page 263

# Links and attachments

## Create a link

Links let you jump to other locations in the same document, to other electronic documents including attachments, or to websites. You can use links to initiate actions or to ensure that your reader has immediate access to related information. You can also add actions to play a sound or movie file.




*Clicking a link jumps to another page, document, or website.*

### See also

"Movies and sounds" on page 288

"Destinations" on page 257

#### Create a link using the Link tool

**1** Choose Tools > Advanced Editing > Link Tool, or select the Link tool in the Advanced Editing toolbar.

The pointer becomes a cross hair (+), and any existing links in the document, including invisible links, are temporarily visible.

**2** Drag a rectangle where you want to create a link. This is the area in which the link is active.

**3** In the Create Link dialog box, choose the options you want for the link appearance.

**4** Select one of the following link actions:

**Go To A Page View** Click Next to set the page number and view magnification you want in the current document or in another document (such as a file attachment), and then click Set Link.

**Open A File** Select the destination file and click Select. If the file is a PDF, specify how the document should open (for example in a new window or within an existing window), and then click OK.

***Note:*** *If the filename is too long to fit in the text box, the middle of the name is truncated.*

**Open A Web Page** Provide the URL of the destination web page.

**Custom Link** Click Next to open the Link Properties dialog box. In this dialog box, you can set any action, such as reading an article, or executing a menu command, to be associated with the link.

#### Create a link using the Select tool or Snapshot tool

**1** Using the Select tool or the Snapshot tool (Tools > Select & Zoom), drag to select the text or image from which you want to create a link.

**2** Right-click/Control-click the selection, and choose Create Link.

**3** Select the options you want in the Create Link dialog box.

***Note:*** *The Custom Link option is not available for links created from selected text.*

## Edit a link

You can edit a link at any time. You can change its hotspot area or associated link action, delete or resize the link rectangle, or change the destination of the link. Changing the properties of an existing link affects only the currently selected link. If a link isn't selected, the properties will apply to the next link you create.

*You can change the properties of several links at once if you drag a rectangle to select them using the Link tool or the Select Object tool.*

### Move or resize a link rectangle

**1** Select the Link tool or the Select Object tool, and then move the pointer over the link rectangle so that the handles appear.

**2** Do one of the following:

- To move the link rectangle, drag it.
- To resize the link rectangle, drag any corner point.

### Change the appearance of a link

**1** Select the Link tool and double-click the link rectangle.

**2** In the Appearance tab of the Link Properties dialog box, choose a color, line thickness, and line style for the link.

**3** Select a highlight style for when the link is selected:

**None** Doesn't change the appearance of the link.

**Invert** Changes the link's color to its opposite.

**Outline** Changes the link's outline color to its opposite.

**Inset** Creates the appearance of an embossed rectangle.

***Note:*** *The Link Type, Color, and Line Style options are not available if Invisible is selected for Appearance.*

**4** Select Invisible Rectangle for Link Type if you don't want users to see the link in the PDF. An invisible link is useful if the link is over an image.

**5** Select the Locked option if you want to prevent users from accidentally changing your settings.

**6** To test the link, select the Hand tool.

***Note:*** *The link properties in the Create Link dialog box apply to all new links that you create until you change the properties. To reuse the appearance settings for a link, right-click/Control-click the link whose properties you want to use as the default, and choose Use Current Appearance As New Default.*

### Edit a link action

**1** Select the Link tool and double-click the link rectangle.

**2** In the Actions tab of the Link Properties dialog box, select the listed action you want to change, and click Edit.

### Delete a link

**1** Select the Link tool or the Select Object tool.

**2** Select the link rectangle you want to delete.

**3** Choose Edit > Delete, or press the Delete key.

## Create web links from URLs

You can automatically create links in a PDF from all URLs or from URLs on selected pages. When selected, the Create Links From URLs setting in the General preferences generates active links from text in all PDFs that you open.

### Create web links

**1** Choose Advanced > Document Processing > Create Links From URLs.

**2** In the Create Web Links dialog box, select All to create links from all URLs in the document, or select From and enter a page range to create links on selected pages.

### Remove all web links

❖ Choose Advanced > Document Processing > Remove All Links.

## Link to a file attachment

You can direct users to a PDF attachment by creating a link in the parent PDF document that jumps to the attachment.

***Note:*** *Don't confuse file attachments with files that can be opened from a link. Linked documents may be stored in different locations; file attachments are always saved with the PDF.*

**1** Open a PDF that contains a PDF file attachment.

**2** Go to where you want to create a link. If that location is in the file attachment, click the Attachments button in the navigation pane, select the file attachment, and click Open.

**3** Choose Tools > Advanced Editing > Link Tool, or select the Link tool in the Advanced Editing toolbar.

**4** Select the area for the link.

**5** In the Create Link dialog box, set the link appearance, select Go To A Page View, and then click Next.

**6** Set the page number and view magnification you want, either in the parent PDF document or in the file attachment, and then click Set Link.

## Destinations

A *destination* is the end point of a link and is represented by text in the Destinations panel. Destinations enable you to set navigation paths across a collection of PDFs. Linking to a destination is recommended when linking across documents because, unlike a link to a page, a link to a destination is not affected by the addition or deletion of pages within the target document.

## View and manage destinations

Manage destinations from the Destinations panel in the navigation pane.

### View destinations

❖ Choose View > Navigation Panels > Destinations. All destinations are automatically scanned.

**Sort the destinations list**

❖ Do one of the following:

- To sort destination names alphabetically, click the Name label at the top of the Destinations panel.
- To sort destinations by page number, click the Page label at the top of the Destinations panel.

**Change or delete a destination**

❖ In the Destinations panel, right-click/Control-click the destination, and choose a command:

- To move to the target location, choose Go To Destination.
- To delete the destination, choose Delete.
- To reset the target of the destination to the page displayed, choose Set Destination.
- To give the destination a different name, choose Rename.

## Create and link a destination

You can create a link to a destination in the same or another PDF.

**1** In the target document (destination), choose View > Navigation Panels > Destinations. If the document already includes a destination that you want to link to, skip to step 5.

**2** Navigate to the location where you want to create a destination, and set the desired view.

**3** In the Destinations panel, choose New Destination from the Options menu, and name the destination.

**4** Save the target document.

**5** In the source document (where you want to create the link), choose Tools > Advanced Editing > Link tool , and drag a rectangle to specify a location for the link.

**6** In the Create Link dialog box, set the link appearance, select Go To A Page View, and then click Next.

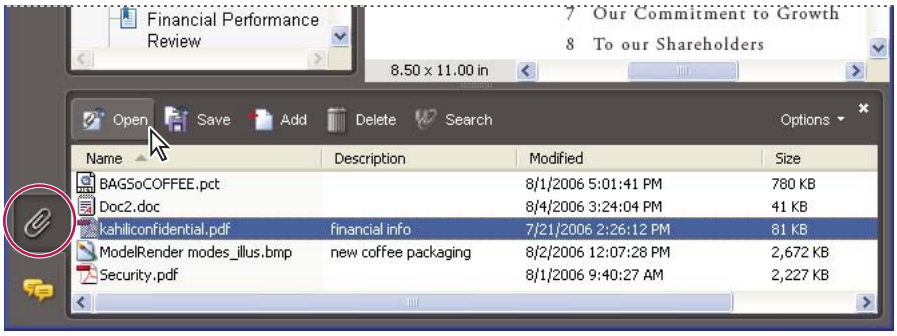
**7** In the target document, in the Destinations panel, double-click the destination.

**8** Save the source document.

## Add an attachment

You can attach PDFs and other types of files to a PDF. If you move the PDF to a new location, the attachments move with it. Attachments may include links to or from the parent document or to other attachments.

Don't confuse attached comments with file attachments. Attached comments appear in the page with the File Attachment icon  or the Speaker icon , and in the Comments List with other comments. (See "Add comments in a file attachment" on page 169.)




*Use the Attachments panel to add, delete, or view attachments.*

**1** Add an attachment by doing one of the following:

- Choose Document > Attach A File.
- Click the Attach A File button in the File toolbar.

***Note:*** *The Attach A File button doesn't appear by default. To add it, right-click/Control-click the toolbar background, choose More Tools, select Attach A File located under File Toolbar, and click OK.*

**2** In the Add Attachment dialog box, select the file you want to attach, and click Open.

***Important:*** *If you try to attach certain file formats (such as EXE, VBS, or ZIP), Acrobat warns you that it won't open the file once attached because the format is associated with malicious programs, macros, and viruses that can damage your computer. To open and save file attachments that you trust, regardless of file format, set your Trust Manager preferences. See "Restrict URLs and attachments in PDFs" on page 196.*

**3** To make the attachment viewable in Acrobat 5.0 or earlier, do one of the following:

- Click the Attachments button in the navigation pane, and select Show Attachments By Default from the Options menu (selected by default).
- Choose File > Properties, click the Initial View tab, choose Attachments Panel And Page from the Show menu, and click OK.

**4** Save the PDF.

**5** (Optional) To add a description to the attachment that helps differentiate between similar files in the Attachments panel, select the attached file, and choose Options > Edit Description. Edit the text of the description, and then save the file.

## Open, save, or delete an attachment

You can open a PDF attachment and make changes to it—if you have permissions—and your changes are applied to the PDF attachment.

For other types of file attachments, you have an option of opening or saving the file. Opening the file starts the application that handles the file format of the attachment—you must have that application to open the attachment. Any changes you make are not applied to the attachment. Instead, save changes to the file, and then reattach it to the PDF document.

***Note:*** *Acrobat requires your approval every time you open or save certain file formats (such as EXE, VBS, or ZIP) because these formats are associated with malicious programs, macros, and viruses that can damage your computer. To open and save trusted file attachments without being prompted, set your Trust Manager preferences. See "Restrict URLs and attachments in PDFs" on page 196.*

#### Open an attachment

❖ In the Attachments panel, select the attachment, and then click Open or choose Open Attachment from the Options menu.

#### Save an attachment

**1** In the Attachments panel, select one or more attachments, and click Save or choose Save Attachment from the Options menu.

If you selected a single attachment, you have the option to rename the file.

**2** Specify a location, and then click Save.

#### Delete an attachment

❖ In the Attachments panel, select an attachment, and click the Delete button or choose Delete Attachment from the Options menu.

### Search in attachments

When searching for specific words or phrases, you can include PDF attachments in the search. Search results from attachments appear in the Results list beneath the attachment filename and icon. Attachments in other formats are ignored by the search engine.

#### Search PDF attachments from the Attachments panel

**1** In the Attachments panel, click the Search Attachment button or choose Search Attachments from the Options menu. The Search PDF window opens.

**2** Type the word or phrase that you want to search for, select the results option you want, and then click Search Attachments.

#### Search PDF attachments from the Search PDF window

**1** Open the Search PDF window by doing one of the following:

- From the Find menu, choose Open Full Acrobat Search.
- Choose Edit > Search.

**2** Type the word or phrase that you want to search for, and select the results option you want.

**3** Click Use Advanced Search Options at the bottom of the window, and then select Include Attachments.

# Actions and scripting

## About Actions

You can cause an action to occur when a bookmark or link is clicked, or when a page is viewed. For example, you can use links and bookmarks to jump to different locations in a document, execute commands from a menu, and perform other actions. Actions are set in the Properties dialog box.

For bookmarks or links, you specify an action that occurs when the bookmark or link is clicked. For other items, such as pages, media clips and form fields, you define a trigger that causes the action to occur and then define the action itself. You can add multiple actions to one trigger.

The Locked option prevents the appearance and actions associated with an object from being accidentally changed.

## Add an action

**1** Do one of the following:

- Using the Hand tool, right-click/Control-click the bookmark or page thumbnail, and choose Properties.
- Using the Select Object tool, double-click the link, media clip, or form field, and choose Properties.

**2** Click the Actions tab.

**3** From the Select Action menu, select the action type to occur, and then click Add. You can add multiple actions; actions execute in the order that they appear in the Actions list box.

**4** (Optional) Select an action in the Actions tab, and use the buttons to reorder, edit, or delete the action.

**5** Close the window to accept the actions.

## Add actions with page thumbnails

To enhance the interactive quality of a document, you can specify actions, such as changing the zoom value, to occur when a page is opened or closed.

**1** Click the Pages button on the left.

**2** Select the page thumbnail corresponding to the page, and choose Page Properties from the Options menu.

**3** Click the Actions tab.

**4** From the Select Trigger menu, choose Page Open to set an action when the page opens, or choose Page Close to set an action when the page closes.

**5** Choose an action from the Select Action menu, and click Add.

**6** Specify the options for the action, and click OK. The options available depend on the action selected.

**7** To create a series of actions, choose another action from the menu, and click Add again. Use the Up and Down buttons to arrange the actions in the order you want them to occur.

***Note:*** *If you set an action that switches to Full Screen view on Page Open or Page Close, the next time the same page opens or closes, Full Screen view is turned off.*

## Action types

You can assign the following actions to links, bookmarks, pages, media clips, and form fields:

**Execute A Menu Item** Executes a specified menu command as the action.

**Go To A 3D View** Jumps to the specified 3D view.

**Go To A Page View** Jumps to the specified destination in the current document or in another document.

**Import Form Data** Brings in form data from another file, and places it in the active form.

**Open A File** Launches and opens a file. If you are distributing a PDF file with a link to another file, the reader needs the native application of that linked file to open it successfully. (You may need to add opening preferences for the target file.)

**Open A Web Link** Jumps to the specified destination on the Internet. You can use http, ftp, and mailto protocols to define your link.

**Play A Sound** Plays the specified sound file. The sound is embedded into the PDF document in a cross-platform format that plays in Windows and Mac OS.

**Play Media (Acrobat 5 Compatible)** Plays the specified QuickTime or AVI movie that was created as Acrobat 5-compatible. The specified movie must be embedded in a PDF document.

**Play Media (Acrobat 6 And Later Compatible)** Plays a specified movie that was created as Acrobat 6-compatible. The specified movie must be embedded in a PDF document.

**Read An Article** Follows an article thread in the active document or in another PDF document.

**Reset A Form** Clears previously entered data in a form. You can control the fields that are reset with the Select Fields dialog box.

**Run A JavaScript** Runs the specified JavaScript.

**Set Layer Visibility** Determines which layer settings are active. Before you add this action, specify the appropriate layer settings.

**Show/Hide A Field** Toggles between showing and hiding a field in a PDF document. This option is especially useful in form fields. For example, if you want an object to pop up whenever the pointer is over a button, you can set an action that shows a field on the Mouse Enter trigger and hides a field on Mouse Exit.

**Submit A Form** Sends the form data to the specified URL.

## Trigger types

Triggers determine how actions are activated in media clips, pages, and form fields. For example, you can specify a movie or sound clip to play when a page is opened or closed. The available options depend on the specified page element.

## About JavaScript in Acrobat

The JavaScript language was developed by Netscape Communications as a means to create interactive web pages more easily. Adobe has enhanced JavaScript so that you can easily integrate this level of interactivity into your PDF documents.

You can invoke JavaScript code using actions associated with bookmarks, links, and pages. The Set Document Actions command lets you create document-level JavaScript actions that apply to the entire document. For example, selecting Document Did Save runs the JavaScript after a document is saved.

Acrobat 8.0 Professional is required to use JavaScript with forms and batch sequences.

To learn how to create JavaScript scripts, download the JavaScript manuals from the Adobe website. *Developing Acrobat® Applications Using JavaScript™* contains background information and tutorials, and the *JavaScript™ for Acrobat® API Reference* contains detailed reference information. These and other JavaScript resources are located on the Adobe website.

# Converted web pages

## Links and bookmarks in web pages

You can work with a PDF document created from web pages the same way you work with any other PDF. Depending on how you configured Acrobat, clicking a link on a converted web page adds the page for that link to the end of the PDF, if it isn't already included.

***Note:*** *Remember that one web page can become multiple PDF pages. A web page is a single topic (or URL) from a website and is often one continuous HTML page. When you convert a web page to PDF, it may be divided into multiple standard-size PDF pages.*

When you first create a PDF from web pages, tagged bookmarks are generated if Create Bookmarks is selected in the Web Page Conversion Settings dialog box. A standard (untagged) bookmark representing the web server appears at the top of the Bookmarks tab. Under that bookmark is a tagged bookmark for each web page downloaded; the tagged bookmark's name comes from the page's HTML title or the URL, if no title is present. Tagged web bookmarks are initially all at the same level, but you can rearrange them and nest them in family groups to help keep track of the hierarchy of material on the web pages.

If Create PDF Tags is selected when you create a PDF from web pages, structure information that corresponds to the HTML structure of the original pages is stored in the PDF. You can use this information to add tagged bookmarks to the file for paragraphs and other items that have HTML elements.

### See also

"About bookmarks" on page 251

## Get information on converted web pages

You can display a dialog box with the current page's URL, title, date and time downloaded, and other information.

❖ Choose Advanced > Web Capture > Page Info.

## Refresh converted web pages

You can refresh web pages in a PDF to retrieve the most up-to-date version from the website. When you refresh, you download the entire website or link again and build a new PDF. The resulting new PDF lists any pages where components have changed, including text, web links, embedded filenames, and formatting. New pages are downloaded if they have been added to the site. The changed pages are listed as bookmarks in the Bookmarks panel under a bookmark labeled New And Changed Pages.

You can refresh web pages only if Save Refresh Commands was selected when the pages were first downloaded.



*When you refresh web pages, both the original PDF pages and the refreshed version are retained. To keep an archive of changes made to a website, save both versions.*

**1** Choose Advanced > Web Capture > Refresh Pages.

**2** To view new and changed pages, select Create Bookmarks For New And Changed Pages. Then specify the scope of the updated tagged bookmarks that you want to compare:

**Compare Only Page Text To Detect Changed Pages** Compares only the text on the pages.

**Compare All Page Components To Detect Changed Pages** Compares all page components, including text, images, web links, embedded filenames, and formatting.

**3** To not resubmit any previously submitted form data, deselect Resubmit Form Data. Be careful if you have Resubmit Form Data selected because it can result in duplicate purchases or other submissions. This option is available only if a form and query results are on the pages.

**4** To change which pages are updated by refreshing, select Edit Refresh Commands List, select the URLs you want, and click OK.

**5** Click Refresh.

### Compare converted pages with current web pages

❖ To open a page or web link, do one of the following:

- To open the current page in a web browser, choose Advanced > Web Capture > Open Page In Web Browser.
- To open the bookmarked page, right-click/Control-click a tagged bookmark, and choose Open Page In Web Browser.
- To open a linked page, right-click/Control-click a link in the PDF version of the web page, and choose Open Web Link In Browser.

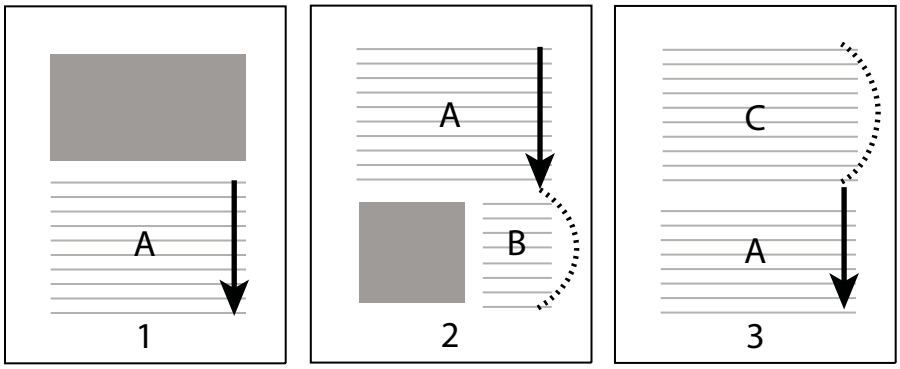
The browser opens in a new application window to the page you specify.

# Articles

### About articles

Many traditional print documents, such as magazines and newspapers, arrange text in multiple columns. Stories flow from column to column and sometimes across several pages. While the format is effective for printed material, this type of structure can be difficult to follow on-screen because of the scrolling and zooming required.

The article feature enables you to guide readers through material presented in multiple columns and across a series of pages.




*The flow of an article thread. The user reads through text A, skips text B and C, and moves on to text A again.*

### Define articles

You create an article by defining a series of boxes around the content in the order in which you want the content read. The navigational path you define for an article is known as the *article thread*. You create a thread connecting the various boxes, unifying them into a continuous text flow.

*Most desktop publishing programs allow you to generate article threads automatically as you convert the files to Adobe PDF. If the file you're viewing has articles, you can show the names of the articles on a tab and navigate easily through them.*

**1** Choose Tools > Advanced Editing > Article Tool, or select the Article tool in the Advanced Editing toolbar. The pointer appears as a cross-hair pointer in the document window.

**2** Drag a rectangle to define the first article box. An article box appears around the enclosed text, and the pointer changes to the article pointer.

Each article box you create has a label that consists of the article number and its sequence within the article. For example, the first box for the first article is labeled 1-1, the second box 1-2, and so on. The boxes for the second article in the same document are labeled 2-1, 2-2, 2-3, and so on.

**3** Go to the next part of the document you want to include in the article, and draw a rectangle around that text. Repeat until you have defined the entire article.

***Note:*** *To resize or move an article box, you must first end the article.*

**4** To end the article, press Enter or Return.

**5** In the Article Properties dialog box, enter the article title, subject, author, and any keywords to describe the article, and click OK.

## View and edit an article

Use the Article tool to create, display, and make changes to an article box in the PDF document.

### View articles on the page

❖ Choose Tools > Advanced Editing > Article Tool.

### View articles in the PDF

**1** Choose View > Navigation Panels > Articles.

***Note:*** *The Articles panel is a floating panel; it is not docked in the navigation pane by default. Drag the Articles panel to the navigation pane to dock it with the other panels.*

**2** To read an article, double-click it, or select the article and choose Read Article from the Options menu in the Articles panel.

The first line of the article appears in the upper left corner.

**3** To hide the Articles panel after the article opens, select Hide After Use in the Options menu of the Articles panel.

### Delete an article or article box

❖ In the Articles panel, do one of the following:

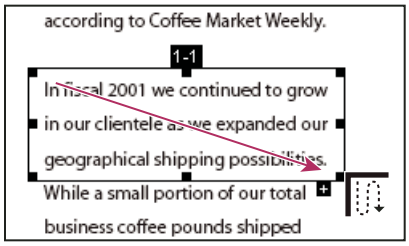
- To delete the entire article, select the article in the Articles panel, and press the Delete key.
- To delete only one box from an article, right-click/Control-click the box, and choose Delete. In the warning message, select Box. If you select Article, the entire article is deleted.

The remaining articles or article boxes are automatically renumbered.

### Insert an article box into an article thread

**1** In the Articles panel, select the article box that you want the new article box to follow.

**2** Click the plus sign (+) at the bottom of the selected box, and click OK when prompted to drag and create a new article box.




*An example of selecting an article with the Article tool*

**3** Draw a new article box. The new box is inserted into the article flow, and all following boxes are renumbered.

### Move or resize an article box

❖ Using the Article tool, select the article box, and do one of the following:

- To move the box, drag it to the new location.
- To resize the box, drag a center handle to change only height or width, or drag a corner handle to change both dimensions.




*An example of resizing an article box*

### Edit article properties

**1** Using the Article tool, select the article box that you want to edit.

**2** Right-click/Control-click the box, and choose Properties.

**3** Change the information in the Articles Properties dialog box, and click OK.

### Combine two articles

**1** In the document pane, select any article box in the article you want to be read first.

**2** Select the plus sign (+) at the bottom of the article box, and click OK to dismiss the prompt to create a new article box.

**3** Ctrl-click/Option-click an article box you want to be read next. The second article is appended to the end of the first article. All article boxes in the piece are renumbered automatically.

# Editing text and objects

## Choosing a tool

A common misconception about PDF documents is that they should behave like any other document that contains images and text, letting you freely move or edit items on a page. A PDF is like a snapshot of your original document. You can perform minor touch-ups, but if your PDF requires substantial revision, it's easier to make changes to the source document and regenerate the PDF.

For editing text and objects, choose from the tools in the Advanced Editing toolbar. To insert editing marks in a PDF to indicate your changes to the original document, see "Mark up text with edits" on page 162.

The TouchUp Text tool lets you add to and replace existing text if the fonts used are available on the system. If the fonts aren't available, you can change only the appearance of existing text. However, you can add new blocks of text using the TouchUp Text tool. The Typewriter tool also lets you create new text, but provides fewer options to modify new text than the TouchUp Text tool.

***Note:*** *Using the TouchUp Text tool may affect how the document reflows, which can make the document less accessible to the visually impaired.*

The Select Object tool provides basic editing capabilities for most objects. You can modify the size, page location, and properties of images, links, fields, and multimedia objects. You can make these same changes with the tool used to create the object.




*Editing text with the TouchUp Text tool*

## Edit text

You can add or replace text only if the font used for that text is installed on your system. If the font isn't installed on your system but is embedded or subsetted in the PDF, you can make changes only to color, word spacing, character spacing, baseline offset, or font size.

You can edit text on rotated lines in the same way as on horizontal lines, and you can edit text using vertical fonts in the same way as text using horizontal fonts. The baseline offset or shift for vertical fonts is left and right, instead of up and down for horizontal fonts.

### Edit text using the TouchUp Text tool

**1** Choose Tools > Advanced Editing > TouchUp Text Tool, or select the TouchUp Text tool in the Advanced Editing toolbar.

**2** Click in the text you want to edit. A bounding box outlines the selectable text.

**3** Select the text you want to edit:

- Choose Edit > Select All to select all the text in the bounding box.

- Drag to select characters, spaces, words, or a line.

**4** Edit the text by doing one of the following:

- Type new text to replace the selected text.
- Press Delete, or choose Edit > Delete to remove the text.
- Choose Edit > Copy to copy the selected text.
- Right-click/Control-click the text and choose the appropriate option.

Click outside the selection to deselect it and start over.

#### Edit text attributes

**1** Select the TouchUp Text tool.

**2** Click in the text you want to edit.

**3** Right-click/Control-click the text, and choose Properties.

**4** In the TouchUp Properties dialog box, click the Text tab. You can change any of the following text attributes:

**Font** Changes the font used by the selected text to the font you specify. You can select any font installed on your system or fully embedded in the PDF document. Document fonts are listed at the top; system fonts are listed below.

**Font Size** Changes the font size to the size (in points) that you specify.

**Character Spacing** Inserts uniform spacing between two or more characters in selected text.

**Word Spacing** Inserts uniform spacing between two or more words in selected text.

**Horizontal Scaling** Specifies the proportion between the height and the width of the type.

**Baseline Offset** Offsets the text from the baseline. The *baseline* is the line on which the type rests.

**Fill** Specifies the fill color.

**Stroke** Specifies the stroke color.

**Stroke Width** Specifies the width of the stroke.

***Note:*** *For legal reasons, you must have purchased a font and have it installed on your system to revise text using that font.*

## Add new text

You can add new text to a PDF using any of the fonts installed on the system.

**1** Select the TouchUp Text tool.

**2** Ctrl-click/Option-click where you want to add text.

**3** In the New Font dialog box, select the font and mode you want, and click OK.

**4** Type the new text.

**5** Do any of the following:

- To change the font size and other attributes, select the text, right-click/Control-click, and choose Properties.
- To move the text block, use the TouchUp Object tool.

## Add text using the Typewriter tool

Use the Typewriter tool to type text anywhere on a PDF page. Organizations sometimes provide PDF versions of their paper forms without interactive form fields. The Typewriter tool provides a simple solution for filling out such forms. The Typewriter tool is similar to the Text Box tool, but includes a different set of default properties.

**1** Choose Tools > Typewriter > Show Typewriter Toolbar, and then click the Typewriter button.

**2** Click where you want to type, and then begin typing. Press Enter to add a second line.

**3** To change the text size, select the text, and click the Decrease Text Size button or the Increase Text Size button in the Typewriter toolbar.

**4** To change the line spacing (leading), select the text, and click the Decrease Line Spacing button or the Increase Line Spacing button.

**5** To move or resize Typewriter text block, select the Select tool, click a Typewriter text block, and drag the text block or one of its corners.

**6** To edit the text again, select the Typewriter tool, and then double-click in the Typewriter text.

## Embed fonts using the TouchUp Text tool

Embedding fonts ensures that your PDF uses the same fonts as the original document, no matter where you open the PDF or what fonts are installed on that system.

**1** Choose Tools > Advanced Editing > TouchUp Text Tool, or select the TouchUp Text tool  in the Advanced Editing toolbar.

**2** Click in the text containing the font embedding or subsetting you want to edit. A paragraph of text is enclosed in a bounding box. You can select text within the paragraph by dragging.

**3** Right-click/Control-click the text, and choose Properties.

**4** In the TouchUp Properties dialog box, click the Text tab to display the font name and font properties as well as embedding and subset capabilities.

**5** To see a list of all the fonts, scroll through the Font menu. Document fonts are listed first. Your system fonts are listed below the document fonts.

**6** Choose a font in the Font menu, check the permissions to determine which options are available for that font, and then select an embedding option:

**Can Embed Font** You can select both the embed and subset options. To embed the entire font rather than a subset, make sure that Subset is not selected.

**Can Embed Font For Print And Preview Only** You can only subset-embed the font. You can embed the font for print and preview but not for editing.

**Cannot Embed Font** Neither the embed nor subset option is available.

**No System Font Available** Neither the embed nor subset option is available.

### See also

"Fonts" on page 106

## Move or edit an object

A selected object usually shows a bounding box. Selection handles appear when the pointer is over the object. When the pointer is over a locked object, no selection handles appear. When you select multiple objects, the last object you select becomes the anchor and appears red; the others appear blue. The anchor object remains stationary during alignment operations.

*To make another object in the selection the anchor object, Ctrl-click/Option-click the new target object twice, once to remove the object from the selection, and once to add it back to the selection. As the last object added to the selection, it becomes the anchor object.*

When objects of the same type are selected and the selection covers multiple pages, you can change the appearance of the objects but not move them.

When you edit a text box, the entire text box is selected; however, the TouchUp Object tool cannot select individual characters that are part of larger text blocks. You must use the TouchUp Text tool to edit individual characters and words.

Use the Select Object tool to select and move objects such as form fields and links.

### Select an object

1 Select one or more objects:

- Click the object with the Select Object tool, or with the tool you used to create the object.
- Right-click/Control-click the object and choose Select All from the context menu. If the Select Object tool is active and the document uses single-page layout, all objects on the current page are selected. If the document is in any other page layout, all objects in the document are selected. If a tool in the Advanced Editing toolbar is active, all objects of that type in the document are selected.
- Drag to create a rectangle around the desired objects. If the Select Object tool is active, all objects within the rectangle are selected. If an Advanced Editing tool is active, press Ctrl as you drag; all objects of the tool type within the rectangle are selected.

2 (Optional) Add one or more objects to the current selection:

- Ctrl-click/Option-click an object.
- Shift-click to add a range of objects. (The Select Object tool includes all objects when you Shift-click.) Using Shift selects all items that lie within the rectangular bounding box formed by all items in the selection (including the item that was just added).

### Move an object

1 Click the object with the Select Object tool or with the tool used to create it.

2 Move the image or object:

- Drag the object to the desired location. Objects cannot be dragged to a different page (you can cut and paste them to a new page instead). Shift-drag the object to constrain movement up or down, or right or left.
- Right-click/Control-click the image and choose an option to move the image on the page.

### Resize an object

1 Click the object with the Select Object tool or with the tool used to create it.

2 Drag a handle of the object. Shift-drag the handle to retain the original aspect ratio.

# Setting up a presentation

## Defining initial view as Full Screen mode

Full Screen mode is a property you can set for PDFs used for presentations. In Full Screen mode, PDF pages fill the entire screen, and the Acrobat menu bar, toolbar, and window controls are hidden. You can also set other opening views, so that your documents or collections of documents open to a consistent view. In either case, you can add page transitions to enhance the visual effect as the viewer pages through the document.

To control how you navigate a PDF (for example, advancing pages automatically), use the options in the Full Screen preferences. These preferences are specific to a system—not a PDF document—and affect all PDFs that you open on that system. Therefore, if you set up your presentation on a system you control, you can control these preferences. To set the Full Screen preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS) and select Full Screen on the left.




*Use the Full Screen button (circled) to view and navigate PDFs as a slide show.*

## Define an initial view

When a user opens your PDF document or PDF package, they see the initial view of the PDF. You can set the initial view to the magnification level, page, and page layout that you want to have appear. If your PDF is a presentation, you may want to set the initial view to Full Screen mode.

After you define the initial view of the PDF, you can add page transitions to selected pages or the entire document.

*Acrobat supports page transitions and bullet fly-ins from PowerPoint.*

### Define the initial view

1. Choose File > Properties.
2. In the Document Properties dialog box, click Initial View.
3. Select the options you want, and then click OK. You have to save and reopen the file to see the effects.

### Define the initial view as Full Screen mode

When setting the initial view of a PDF to Full Screen mode, you must define how the document opens.

**1** Choose File > Properties.

**2** In the Document Properties dialog box, select Initial View.

**3** For best results, do the following:

- Choose Page Only from the Navigation Panel menu.
- Choose Single Page from the Page Layout menu.
- Set Open To Page to the page on which you want to start the presentation.

**4** Select Open In Full Screen Mode to open the document without the menu bar, toolbar, or window controls displayed. Click OK. (You have to save and reopen the file to see the effects.)

***Note:*** *Users can exit Full Screen mode by pressing Esc if their preferences are set this way. However, in Full Screen mode, users cannot apply commands and select tools unless they know the keyboard shortcuts. You may want to set up page actions in the document to provide this functionality.*

### Initial View options for document properties

The Initial View options in the Document Properties are organized into three areas: Layout And Magnification, Window Options, and User Interface Options.

**Layout And Magnification** Determines the appearance of the document.

- **Navigation Panel** Determines which panels are displayed in the navigation pane.
- **Page Layout** Determines how document pages are arranged.
- **Magnification** Sets the zoom level the document will appear at when opened. Default uses the magnification set by the user.
- **Open To Page** Specifies the page that appears when the document opens.

***Note:*** *Setting Default for the Magnification and Page Layout options uses the individual users' settings in the Page Display preferences.*

**Window Options** Determine how the window adjusts in the screen area when a user opens the document. These options apply to the document window itself in relationship to the screen area of the user's monitor.

- **Resize Window To Initial Page** Adjusts the document window to fit snugly around the opening page, according to the options that you selected under Document Options.
- **Center Window On Screen** Positions the window in the center of the screen area.
- **Open In Full Screen Mode** Maximizes the document window and displays the document without the menu bar, toolbar, or window controls.
- **Show File Name** Shows the filename in the title bar of the window.
- **Show Document Title** Shows the document title in the title bar of the window. The document title is obtained from the Description panel of the Document Properties dialog box.

**User Interface Options** Determine which parts of the interface—the menu bar, the toolbars, and the window controls—are hidden.

***Note:*** *If you hide the menu bar and toolbars, users cannot apply commands and select tools unless they know the keyboard shortcuts. You may want to set up page actions that temporarily hide interface controls while the page is in view. (See "Add actions with page thumbnails" on page 261.)*

### Add page transitions

You can create an interesting effect that occurs each time a page advances by using page transitions.

**1** Do one of the following:

- Choose Advanced > Document Processing > Page Transitions.
- In the Pages panel, select the page thumbnails you want to apply transitions to, and choose Page Transitions from the Options menu.

**2** In the Set Transitions dialog box, choose a transition effect from the Transition menu. These transition effects are the same as those set in the Full Screen preferences.

**3** Choose the direction in which the transition effect occurs. Available options depend on the transition.

**4** Choose the speed of the transition effect.

**5** Select Auto Flip, and enter the number of seconds between automatic page turning. If you do not select this option, the user turns pages using keyboard commands or the mouse.

**6** Select the Page Range you want to apply transitions to.

***Note:*** *If users select Ignore All Transitions in the Full Screen preferences, they do not see the page transitions.*

# Document properties and metadata

### View document properties

When you view a PDF, you can get information about it, such as the title, the fonts used, and security settings. Some of this information is set by the person who created the document, and some is generated automatically.

You can change any information that can be set by the document creator, unless the file has been saved with security settings that prevent changes.

**1** Choose File > Properties.

**2** Click a tab in the Document Properties dialog box.

#### See also

"Securing PDFs" on page 208

"Create print presets" on page 328

**Document Properties**

**Description** Shows basic information about the document. The title, author, subject, and keywords may have been set by the person who created the document in the source application, such as Word or InDesign, or by the person who created the PDF. You can search for these description items in Acrobat to find particular documents. The Keywords section can be particularly useful for narrowing searches.

Note that many search engines use the title to describe the document in their search results list. If a PDF does not have a title, the filename appears in the results list instead. A file's title is not necessarily the same as its filename.

The Advanced area shows the PDF version, the page size, number of pages, whether the document is tagged, and if it's enabled for Fast Web View. (The size of the first page is reported in PDFs or PDF packages that contain multiple page sizes.) This information is generated automatically and cannot be modified.

**Security** Describes what changes and functionality are allowed within the PDF. If a password, certificate, or security policy has been applied to the PDF, the method is listed here.

**Fonts** Lists the fonts and the font types used in the original document, and the fonts, font types, and encoding used to display the original fonts.

If substitute fonts are used and you aren't satisfied with their appearance, you may want to install the original fonts on your system or ask the document creator to re-create the document with the original fonts embedded in it.

**Initial View** Describes how the PDF appears when it's opened. This includes the initial window size, the opening page number and magnification level, and whether bookmarks, thumbnails, the toolbar, and the menu bar are displayed. You can change any of these settings to control how the document appears the next time it is opened.

**Custom** Lets you add document properties to your document.

**Advanced** Lists PDF settings, print dialog presets, and reading options for the document.

In the PDF settings, you can set a base Uniform Resource Locator (URL) for web links in the document. Specifying a base URL makes it easy for you to manage web links to other websites. If the URL to the other site changes, you can simply edit the base URL and not have to edit each individual web link that refers to that site. The base URL is not used if a link contains a complete URL address.

You can also associate a catalog index file (PDX) with the PDF. When the PDF is searched with the Search PDF window, all of the PDFs that are indexed by the specified PDX file are also searched.

You can include prepress information, such as trapping, for the document. You can define print presets for a document, which prepopulate the Print dialog box with document-specific values. You can also set reading options that determine how the PDF is read by a screen reader or other assistive device.

## Add a description to Document Properties

You can add keywords to the document properties of a PDF that other people might use in a search utility to locate the PDF.

1. Choose File > Properties.
2. Click the Description tab, and type the author's name, subject, and keywords.
3. (Optional) Click Additional Metadata to add other descriptive information, such as copyright information.

## Create document properties

You can add custom document properties that store specific types of metadata, such as the version number or company name, in a PDF. Properties you create appear in the Document Properties dialog box. Properties you create must have unique names that do not appear in the other tabs in the Document Properties dialog box.

1. Choose File > Properties, and then select Custom.
2. To add a property, type the name and value, and then click Add.

**3** To change the properties, do any of the following, and then click OK:

- To edit a property, select it, change the Value, and then click Change.
- To delete a property, select it and click Delete.

To change the name of a custom property, delete the property and create a new custom property with the name you want.

## Edit document metadata

PDF documents created in Acrobat 5.0 or later contain document metadata in XML format. Metadata includes information about the document and its contents, such as the author's name, keywords, and copyright information, that can be used by search utilities. The document metadata contains (but is not limited to) information that also appears in the Description tab of the Document Properties dialog box. Document metadata can be extended and modified using third-party products.

The Extensible Metadata Platform (XMP) provides Adobe applications with a common XML framework that standardizes the creation, processing, and interchange of document metadata across publishing workflows. You can save and import the document metadata XML source code in XMP format, making it easy to share metadata among different documents. You can also save document metadata to a metadata template that you can reuse in Acrobat.

### View document metadata

**1** Choose File > Properties, and click the Additional Metadata button in the Description tab.

**2** Click Advanced to display all the metadata embedded in the document. (Metadata is displayed by schema—that is, in predefined groups of related information.) Display or hide the information in schemas by clicking the plus or minus sign (Windows) or arrows (Mac OS) next to the schema name. If a schema doesn't have a recognized name, it is listed as Unknown. The XML name space is contained in parentheses after the schema name.

### Edit or append document metadata

**1** Choose File > Properties, click the Description tab, and then click Additional Metadata.

**2** Select Advanced from the list on the left.

**3** To edit the metadata, do any of the following, and then click OK.

- To add previously saved information, click Append, select an XMP or FFO file, and click Open.
- To add new information and replace the current metadata with information stored in an XMP file, click Replace, select a saved XMP or FFO file, and click Open. New properties are added, existing properties that are also specified in the new file are replaced, and existing properties that are not in the replacement file remain in the metadata.
- To delete an XML schema, select it and click Delete.
- To append the current metadata with metadata from a template, hold down Ctrl/Command (and choose a template name from the dialog box menu in the upper right corner.

***Note:*** *You must save a metadata template before you can import metadata from a template.*

- To replace the current metadata with a template of metadata, choose a template file (XMP) from the dialog box menu in the upper right corner.

### Save metadata as a template or file

**1** Choose File > Properties, click the Description tab, and then click Additional Metadata.

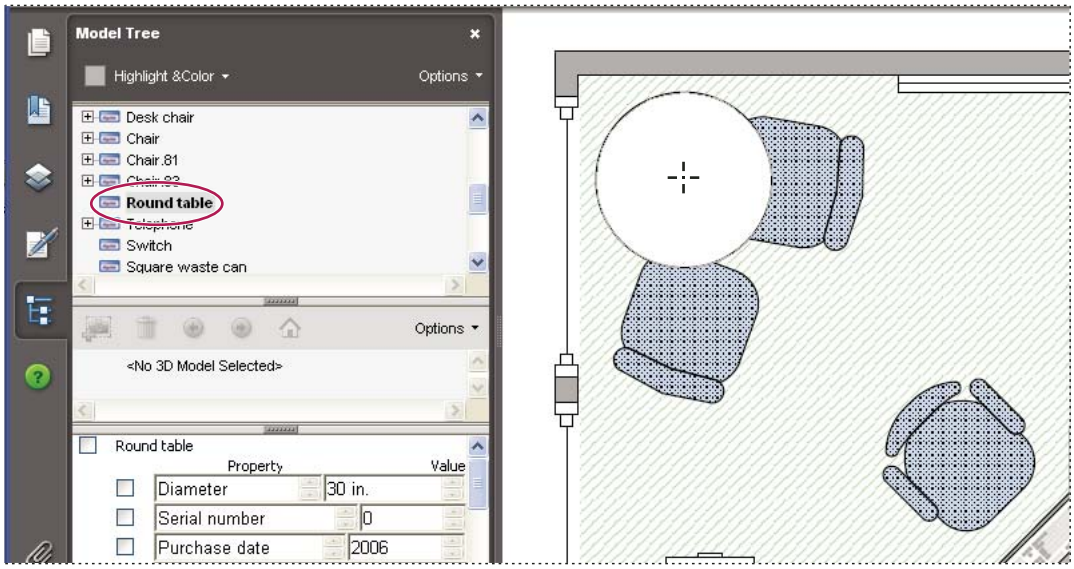
**2** Select Advanced from the list on the left.

**3** Save the document metadata, and then click OK:

- To save the metadata to an external file, click Save and name the file. The metadata is stored as a file in XMP format. (To use the saved metadata in another PDF, open the document and use these instructions to replace or append metadata in the document.)
- To save the metadata as a template, choose Save Metadata Template from the dialog box menu in the upper right corner, and name the file.

## View object data and metadata

You can view the metadata information of certain objects, tags, and images within a PDF. You can edit and export metadata for Visio objects only.




*Use the Object Data tool to view object grouping and object data.*

### See also

"Find text in multiple PDFs" on page 283

#### View and edit Visio object metadata

**1** Choose Tools > Object Data > Object Data Tool.

**2** Double-click an object on the page to show its metadata.

The Model Tree opens and shows a hierarchical list of all structural elements. The selected object's metadata appears as editable properties and values at the bottom of the Model Tree.

*The selected object is highlighted on the page. Use the Highlight Color menu at the top of the Model Tree to choose a different color.*

**3** To edit the metadata, type in the boxes at the bottom of the Model Tree. To save your changes, choose Write Back from the Options menu at the top of the Model tree.

**4** To export object metadata, choose Export To XML > Whole Tree to export all objects in the Model Tree, or choose Export To XML > Current Node to export only the selected object and its children. Name and save the file.

**Export Visio object metadata**

1 Choose Tools > Object Data > Object Data Tool.

2 Double-click an object on the page to show its metadata.

3 In the Options menu at the top of the Model Tree, do one of the following:

- Choose Export As XML > Whole Tree to export all objects.
- Choose Export As XML > Current Node to export only the selected object and its children.

4 Name and save the file.

# Layers

## About PDF layers

Acrobat supports viewing, navigating, and printing layered content in PDFs created from applications such as InDesign, AutoCAD, and Visio.

You can control the display of layers using the default and initial state settings. For example, if your document contains a copyright notice, you can easily hide the layer containing that notice whenever the document is displayed on-screen while ensuring that the layer always prints.

## Show or hide layers

Information can be stored on different layers of a PDF. The layers that appear in the PDF are based on the layers created in the original application. You cannot create layers in Acrobat; however, you can examine layers and show or hide the content associated with each layer using the Layers panel in the navigation pane. Items on locked layers cannot be hidden.

***Note:*** *A Lock icon in the Layers panel indicates that a layer is for information only. The locked layer's visibility cannot be changed.*




*Layers panel*
***A.*** *Eye icon indicates a displayed layer* ***B.*** *Locked layer* ***C.*** *Hidden layer*

1 Choose View > Navigation Panels > Layers, and then do one of the following:

- To hide a layer, click the eye icon. To show a hidden layer, click the empty box. (A layer is visible when the eye icon is present, and hidden when the eye icon is absent. This setting temporarily overrides the settings in the Layer Properties dialog box.)
- To show or hide multiple layers, choose an option from the Options menu in the Layers panel.

**2** From the Options menu in the Layers panel, choose one of the following:

**List Layers For All Pages** Shows every layer across every page of the document.

**List Layers For Visible Pages** Shows layers only on the currently visible pages.

**Reset To Initial Visibility** Resets layers to their default state.

**Apply Layer Overrides** Displays all layers. This option affects all optional content in the PDF, even layers that are not listed in the Layers panel. All layers are visible, regardless of the settings in the Layer Properties dialog box. You cannot change layer visibility using the eye icon until you deselect this command. You can edit layer properties in the Layer Properties dialog box, but changes (except changes to the layer name) are not effective until you choose Reset To Initial Visibility in the Options menu.

***Note:*** *You cannot save the view of a layered PDF by using the eye icon in the Layers panel to show and hide layers. When you save the file, the visibility of the layers automatically reverts to the initial visibility state.*

## Add layer navigation

You can add links and destinations to layers, allowing you to change the view of a document when the user clicks a bookmark or link.

***Note:*** *In general, changes to layer visibility made using the eye icon in the Layers panel are not recorded in the Navigation toolbar.*

### Associate layer visibility with bookmarks

**1** Set the required layer properties, visibility, and magnification level for the target PDF layer in the document pane.

**2** Click the Bookmarks button, and choose New Bookmark from the Options menu.

**3** Select the new bookmark, and choose Properties from the Options menu.

**4** In the Bookmark Properties dialog box, click the Actions tab.

**5** For Select Action, choose Set Layer Visibility, click Add, and then click OK.

**6** Select the bookmark label in the Bookmarks panel, and name the bookmark.

### Associate layer visibility with a link destination

**1** Set the required layer properties for the destination in the document pane.

**2** Choose View > Navigation Panels > Destinations.

The Destinations panel appears in a floating panel. You can add it to the other panels by dragging it to the navigation pane. If the panel is collapsed, click the Destinations button to expand it.

**3** Click the Create New Destination button or select New Destination from the Options menu, and name the destination.

**4** Select the Link tool, and drag in the document pane to create a link. (Because content is added to all layers, it doesn't matter that you are apparently creating the link on the target layer. The link works from any layer.)

**5** In the Create Link dialog box, select Custom Link and click Next.

**6** Click the Appearance tab in the Link Properties dialog box, and set the appearance of the link.

**7** Click the Actions tab in the Link Properties dialog box, choose Set Layer Visibility, and click Add.

**8** Close the dialog boxes.

You can test the link by changing the layer settings, selecting the Hand tool, and clicking the link.

## Editing layered content

You can select or copy content in a layered PDF document using the Select tool or the Snapshot tool. You can edit content using a touchup tool. These tools recognize and select any content that is visible, regardless of whether the content is on a selected layer.

If the content that you edit or delete is associated with one layer, the content of the layer reflects the change. If the content that you edit or delete is associated with more than one layer, the content in all the layers reflects the change. For example, if you want to change a title and byline that appear on the same line on the first page of a document, and the title and byline are on two different visible layers, editing the content on one layer changes the content on both layers.

You can add content, such as review comments, stamps, or form fields, to layered documents just as you would to any other PDF document. However, the content is not added to a specific layer, even if that layer is selected when the content is added. Rather, the content is added to the entire document.

You can use the Create PDF From Multiple Files command to combine PDF documents that contain layers. The layers for each document are grouped under a separate heading in the Layers panel of the navigation pane. You expand and collapse the group by clicking the icon in the title bar for the group.

### See also

“Move or edit an object” on page 270

# Chapter 12: Searching and indexing

You have lots of control and lots of possibilities for running effective and efficient searches in Adobe Acrobat. A search can be broad or narrow, including many different kinds of data and covering multiple Adobe PDFs.

If you work with large numbers of related PDFs, you can define them as a catalog, which generates a PDF index for the PDFs. Searching the PDF index—instead of the PDFs themselves—dramatically speeds up searches.

## Quickstart

The following topics provide simple steps to some common searching tasks.

### Search for text

Use Find to search for text in an open PDF.

1. Type search terms in the Find text box on the toolbar.
2. (Optional) Click the arrow next to the Find text box and select any desired options, such as Include Bookmarks.
3. Press Enter.

To search all PDFs in a folder, choose Open Full Acrobat Search from the Find pop-up menu, click All PDF Documents In, and then select the folder you want to search.

#### See also

"Find text in a PDF" on page 282

### Search for text in comments

You can search for text in comments, as well as the body of the PDF.

1. Type search terms in the Find text box on the toolbar.
2. Click the arrow next to the Find text box and select Include Comments.
3. Press Enter.

To see all search results at once, choose Open Full Acrobat Search from the Find pop-up menu and select In The Current PDF Document and Include Comments.

#### See also

"Find text in a PDF" on page 282

### Search PDFs in a package

You can search all PDFs in an Adobe PDF package or only selected PDFs.

1. Open the package you want to search.
2. Type search terms in the Find text box, and choose Open Full Acrobat Search from the Find pop-up menu.

**3** Choose In The Entire PDF Package. Or choose In Selected PDF Documents, and then select the desired PDFs from the list of PDFs included in the package.

### See also

"Find text in multiple PDFs" on page 283

### Search attachments

You can search for words in single PDF or in multiple PDFs, along with any attached PDFs up to two levels deep.

**1** Choose Edit > Search, and click Use Advanced Search Options at the bottom of the window.

**2** Type search terms in the text box, and choose how you want to restrict the search results.

**3** Choose where you want to search.

**4** Select Include Attachments, and then click Search.

### See also

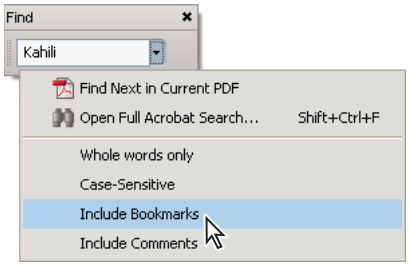
"Advanced Search Options" on page 284

# Searching PDFs

### Search features overview

You run searches to find specific items in PDFs. You can run a simple search, looking for a search term within in a single file, or you can run a more complex search, looking for various kinds of data in one or more PDFs.

You can run a search using either the Search window or the Find toolbar. In either case, Acrobat searches the PDF body text, layers, form fields, and digital signatures. You can also include bookmarks and comments in the search.




The Search window offers more options and more kinds of searches than the Find toolbar. When you use the Search window, object data and image XIF (extended image file format) metadata are also searched. For searches across multiple PDFs, Acrobat also looks at document properties and XMP metadata, and it searches indexed structure tags when searching a PDF index. If some of the PDFs you search have attached PDFs, you can include the attachments in the search.

***Note:*** *PDFs can have multiple layers. If the search results include an occurrence on a hidden layer, selecting that occurrence displays an alert that asks if you want to make that layer visible.*

### See also

"Show or hide layers" on page 277

"Examine a PDF for hidden content" on page 197

## Access the search features

Where you start your search depends on the type of search you want to run. Use the Find toolbar for a quick search of the current PDF. Use the Search window to look for words or document properties across multiple PDFs, use advanced search options, and search PDF indexes.

#### Display the Find toolbar

By default, the Find toolbar is already open. Use this procedure to open it if it has been closed.

❖ Do one of the following:

- Choose Edit > Find.
- Right-click/Control-click the toolbar area and choose Find on the context menu.
- Press Ctrl+F/Command+F.

#### Open the Search window

❖ Do one of the following:

- Choose Edit > Search.
- On the Find toolbar, click the arrow and choose Open Full Acrobat Search.

Search appears as a separate window that you can move, resize, minimize, or arrange partially or completely behind the PDF window.

#### Arrange the PDF document window and Search window

❖ In the Search window, click Arrange Windows.

Acrobat resizes and arranges the two windows side by side so that together they almost fill the entire screen.

***Note:*** *Clicking the Arrange Windows button a second time resizes the document window but leaves the Search window unchanged. If you want to make the Search window larger or smaller, drag the corner or edge, as you would to resize any window on your operating system.*

## Find text in a PDF

The Find toolbar searches the currently open PDF.

**1** Type the text you want to search for in the text box on the Find toolbar.

**2** (Optional) Click the arrow next to the text box and choose one or more of the following:

**Whole Words Only** Finds only occurrences of the complete word you type in the text box. For example, if you search for the word *stick*, the words *tick* and *sticky* aren't found.

**Case-Sensitive** Finds only occurrences of the words that match the capitalization you type. For example, if you search for the word *Web*, the words *web* and *WEB* aren't found.

**Include Bookmarks** Also searches the text in the Bookmarks panel.

**Include Comments** Also searches the text of any comments.

**3** Press Enter.

Acrobat jumps to the first instance of the search term, which appears highlighted.

**4** Press Enter repeatedly to go to the next instances of the search term.

## Find text in multiple PDFs

The Search window enables you to look for search terms in multiple PDFs. For example, you can search across all open PDF documents, all PDFs in a specific location, or an open PDF package.

***Note:*** *If documents are encrypted (have security applied to them), you cannot search them as part of a multiple-document search. You must open those documents first and search them one at a time. However, documents encrypted as Adobe Digital Editions are an exception and can be searched as part of a multiple-document search.*

### See also

"About PDF packages" on page 112

#### Find text in PDFs in a specific folder

**1** Open Acrobat on your desktop (not in a web browser).

**2** Do one of the following.

- In the Find toolbar, type the text you want to search for, and then choose Open Full Acrobat Search from the pop-up menu.
- In the Search window, type the text you want to search for in the text box.

**3** In the Search window, select All PDF Documents In. From the pop-up menu directly below this option, choose Browse For Location.

**4** Select the location you want to search, either on your computer or on a network, and click OK.

**5** If you want to specify additional search criteria, click Use Advanced Search Options, and select the options you want.

**6** Click Search.



*During a search, you can click a result or use keyboard shortcuts to navigate the results without interrupting the search. Clicking the Stop button under the search-progress bar cancels further searching and limits the results to the occurrences already found. It doesn't close the Search window or delete the Results list. To see more results, you must run a new search.*

#### Search a PDF package

**1** Open the PDF in Acrobat on your desktop (not in a web browser).

**2** Do one of the following.

- In the Find toolbar, type the text you want to search for in the text box and then choose Open Full Acrobat Search from the pop-up menu.
- In the Search window, type the text you want to search for in the text box.

**3** In the Search window, choose a location to look in:

- To search all PDFs in the package, choose In The Entire PDF Package.
- To search only some PDFs in the package, choose In Selected PDF Documents. Then select the PDFs you want to search in the PDF package navigation area.

**4** If you want to specify additional search criteria, click Use Advanced Search Options, and select the options you want.

**5** Click Search.

## Review search results

After you run a search from the Search window, the results appear in page order, nested under the names of each searched document. Each item listed includes a few words of context (if applicable) and an icon that indicates the type of occurrence.

### Jump to a specific instance in the search results

**1** If necessary, click the plus sign (+) (Windows) or the triangle (Mac OS) to expand the search results. Then select an instance in the results to view that instance in the PDF.

**2** To view other instances, do any of the following:

- Click another instance in the results.
- Choose Edit > Search Results, and then choose Next Result or Previous Result.

### Sort instances in the search results

❖ Select an option from the Sort By menu near the bottom of the Search window. Results can be sorted by Relevance Ranking, Date Modified, Filename, or Location.

### Icons shown with search results

The icon next to an instance of the search results indicates the search area in which the instance appears. Selecting an icon has the following effect:

**Document icon** Makes the PDF active in the document window. Click the plus (+) (Windows) or the triangle (Mac OS) next to the icon to show the list of individual search results within that PDF.

**(General) Search Result icon** Jumps to that instance of the search term, usually in the body text of the PDF. The instance of the search term is highlighted in the document.

**Bookmark icon** Opens the Bookmarks panel and highlights the instances of the search terms.

**Comments icon** Opens the Comments panel and highlights the instances of the search terms.

**Layer icon** May open a message indicating that the layer is hidden and asking if you want to make it visible.

**Attachment icon** Opens a PDF file that is attached to the searched parent PDF and shows the highlighted instances of the search terms.

## Advanced Search Options

By default, the Search window displays basic search options. Click Use Advanced Search Options near the bottom of the window to display additional options. To restore the basic options, click Use Basic Search Options near the bottom of the window.

*You can set a preference so that advanced search options always appear in the Search window. Access preferences by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS). Then select Search under Categories.*

**Return Results Containing** Restricts your search results according to the option you choose:

- **Match Exact Word Or Phrase** Searches for the entire string of characters, including spaces, in the same order in which they appear in the text box.

• **Match Any Of The Words** Searches for any instances of at least one of the words typed. For example, if you search for *each of*, the results include any instances in which one or both of the two words appear: *each, of, each of,* or *of each.*

• **Match All Of The Words** Searches for instances that contain all your search words, but not necessarily in the order you type them. Available only for a search of multiple PDFs or index definition files.

• **Boolean Query** Uses the Boolean operators that you type with the search words into the What Word Or Phrase Would You Like To Search For box. Available only for searching multiple PDFs or PDF indexes.

***Note:*** *You cannot run wildcard searches using asterisks (*) or question marks (?) when searching PDF indexes.*

**Use These Additional Criteria (text options)** Includes the basic search options plus four additional options:

• **Look In** Restricts the search to the current PDF, parts or all of a currently open PDF package (if applicable), an index, or a location on your computer. If you choose to search an index, a location, or a PDF package, additional options appear under Use These Additional Criteria.

• **Proximity** Searches for two or more words that are separated by no more than a specified number of words, as set in the Search preferences. Available only for a search of multiple documents or index definition files, and when Match All Of The Words is selected.

• **Stemming** Finds words that contain part (the stem) of the specified search word. For example, a search for *opening* finds instances of *open, opened, opens,* and *openly*. This option applies to single words and phrases when you search the current PDF, a folder, or an index created with Acrobat 6.0 or later. Wildcard characters (*, ?) aren't permitted in stemming searches. Stemming isn't available if either Whole Words Only or Case-Sensitive is selected.

• **Include Bookmarks** Searches the text of any bookmarks, as viewed in the Bookmarks panel.

• **Include Comments** Searches the text of any comments added to the PDF, as viewed in the Comments panel.

• **Include Attachments** Searches PDFs that are attached to the current PDF or other attached PDFs (up to two levels deep).

**Use These Additional Criteria (document properties)** Appears only for searches across multiple PDFs or PDF indexes. You can select multiple property-modifier-value combinations and apply them to searches.

***Note:*** *You can search by document properties alone by using document property options in combination with a search for specific text.*

• **Check box** Applies the criteria set in the three connected options to the search. (The check box is selected automatically when you enter information in any of the three options for that set. After you enter options, deselecting the check box doesn't clear the entries; they just aren't applied to the search.)

• **First menu (property)** Indicates the document characteristic to search for. The available options include Date Created, Date Modified, Author, Title, Subject, Filename, Keywords, Bookmarks, Comments, JPEG Images, XMP Metadata, and Object Data.

• **Second menu (modifier)** Indicates the level of matching. If the first menu selection is a date, the available options in the second menu are Is Exactly, Is Before, Is After, Is Not. Otherwise, the available options are Contains and Does Not Contain.

• **Third box (value or text)** Indicates the information to be matched, which you type in. If the first menu selection is a date, you can click the arrow to open a calendar that you can navigate to find and select the date you want.

### Boolean operators

Commonly used Boolean operators include the following:

**AND** Use between two words to find documents that contain both terms, in any order. For example, type **paris AND france** to identify documents that contain both *paris* and *france*. Searches with AND and no other Boolean operators produce the same results as selecting the All Of The Words option.

**NOT** Use before a search term to exclude any documents that contain that term. For example, type **NOT kentucky** to find all documents that don't contain the word *kentucky*. Or, type **paris NOT kentucky** to find all documents that contain the word *paris* but not the word *kentucky*.

**OR** Use to search for all instances of either term. For example, type **email OR e-mail** to find all documents with occurrences of either spelling. Searches with OR and no other Boolean operators produce the same results as selecting the Any Of The Words option.

**^ (exclusive OR)** Use to search for all instances that have either term but not both. For example, type **cat ^ dog** to find all documents with occurrences of either *cat* or *dog* but not both *cat* and *dog*.

**( )** Use parentheses to specify the order of evaluation of terms. For example, type **white AND (whale OR ahab)** to find all documents that contain either *white* and *whale* or *white* and *ahab*. (The query processor performs an OR query on *whale* and *ahab* and then performs an AND query on those results with *white*.

To learn more about Boolean queries, syntax, and other Boolean operators that you can use in your searches, refer to any standard text, website, or other resource with complete Boolean information.

## Search index files of cataloged PDFs

A full-text index is created when someone uses Acrobat to define a *catalog* of PDFs. You can search that index for the words you want to find rather than running a full-text search of each individual PDF in the catalog. An index search produces a results list with links to the occurrences of the indexed documents.

***Note:*** *To search a PDF index, you must open Acrobat as a standalone application, not within your web browser. In Mac OS, indexes created with some older versions of Acrobat are not compatible with the Acrobat 8 Search feature and must be updated before you can use Acrobat 8 to search them.*

**1** Open the Search window, type the words you want to find, and then click Use Advanced Search Options (near the bottom of the window).

**2** For Look In, choose Select Index.

**3** In the Index Selection dialog box, select an index, if the one you want to search is available, or click Add and then locate and select the index to be searched, and click Open. Repeat as needed until all the indexes you want to search are selected.

***Note:*** *You can read file data about a selected index by clicking Info, and you can exclude indexes from the search either by selecting them and choosing Remove or by clearing the check box for that index.*

**4** Click OK to close the Index Selection dialog box, and then choose Currently Selected Indexes on the Look In pop-up menu.

**5** Proceed with your search as usual, selecting other options you want to apply, and clicking Search.

***Note:*** *Selecting the Match Whole Word Only option when searching indexes significantly reduces the time taken to return results.*

### See also

"Search features preferences" on page 287

### Search features preferences

Access preferences for search features by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then clicking Search under Categories.

**Ignore Asian Character Width** Finds both half-width and full-width instances of the Asian language characters in the search text.

**Ignore Diacritics And Accents** Finds the search terms with any variation of the alphabetical characters. For example, typing *cafe* finds both *cafe* and *café*. Likewise, typing *café* finds both versions. If this option isn't selected, typing *cafe* doesn't find *café*, and vice versa.

**Always Use Advanced Search Options** Makes the advanced options available in the Search window, in addition to the basic options.

**Maximum Number Of Documents Returned In Results** Limits the search results in the Search PDF window to a specific number of documents. The default value is 500, but you can enter any number from 1 to 10,000.

**Range Of Words For Proximity Searches** Limits the search results to those in which the number of words between the search terms isn't greater than the number you specify. Accepts a range from 1 to 10,000.

**Enable Fast Find** Generates a cache of information from any PDF that you search. This cache reduces subsequent search times for that PDF.

**Maximum Cache Size** Limits the temporary cache of search information for the Fast Find option to the specified size in megabytes (between 5 and 10,000). The default setting is 100.

**Purge Cache Contents** Deletes the Fast Find option's entire temporary cache of search information.



*If you accidentally close the Search window while reviewing the results of a search, click the Search button to display the results, or choose Edit > Search Results > Next Result or Previous Result. The most recent search results remain until you run another search or close Acrobat.*

# Creating PDF indexes

## Create and manage an index in a PDF

You can reduce the time required to search a long PDF by embedding an index of the words in the document. Acrobat can search the index much faster than it can search the document. The embedded index is included in distributed or shared copies of the PDF. Users search PDFs with embedded indexes exactly as they search those without embedded indexes; no extra steps are required.

#### Add an index to a PDF

1. With the document open in Acrobat, choose Advanced > Document Processing > Manage Embedded Index.
2. In the Manage Embedded Index dialog box, click Embed Index.
3. Read the messages that appear, and click OK.

***Note:** In Outlook and Lotus Notes, you have the option of embedding an index when you convert email messages or folders to PDF. This is especially recommended for folders containing many email messages.*

#### Update or remove the embedded index in a PDF

1. Choose Advanced > Document Processing > Manage Embedded Index.
2. Click either Update Index or Remove Index.
3. Click OK in the confirmation message.

# Chapter 13: Movies, sounds, and 3D models

The possibilities for Adobe PDFs extend to the richness of multimedia communication. PDFs can include video clips, digital audio, and 3D models that readers can move, turn, zoom in on, and examine part by part.

## Movies and sounds

### Play movies and sounds

PDFs can include many types of movie and sound files, including (but not limited to) Flash, QuickTime, mp3, MPEG, and Windows Media files. These files may be accessed on a page or within a link, bookmark, form field, or page action. Each movie and sound file includes a play area from which the media can be activated. The play area typically appears on the PDF page as an image or a rectangle, but can also be invisible.

***Note:*** *You must have the necessary hardware and software installed to play the media files.*

*To help protect your computer from viruses, Acrobat solicits your approval before playing multimedia files from unverified sources. You can change this default behavior in the Multimedia Trust preferences.*

❖ Using the Hand tool or the Select tool, click the play area of the movie or sound file. When the pointer is positioned over the play area, it changes to the play mode icon .

### Multimedia preferences

You can specify the media player you want to play movies and sounds by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then selecting Multimedia from the left side of the dialog box.

**Preferred Media Player** Choose the default player that plays media clips from the list of currently installed media players.

**Accessibility Options** Specify if you want special features (if available) to appear when media plays, such as subtitles and dubbed audio. Specify the preferred language for the media, in case multiple languages are available.

### Multimedia Trust preferences

In the Multimedia Trust preferences, you can specify whether to play embedded multimedia files in trusted or nontrusted PDF documents. A *trusted* document is a document that you approved or that was produced by an author you approved. By setting your permissions to play multimedia only in trusted documents, you can prevent programs, macros, and viruses from playing on, and potentially damaging, your computer.

The list of trusted documents and authors is stored internally and can't be viewed. If you add a certified document to the list, both the document and the author's certificate are added to the list of trusted documents. All documents that are certified by this author are trusted. (Trusted documents also include PDFs that were created by authors in your list of trusted identities.)

To access these preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then select Multimedia Trust from the left side of the dialog box.

**Display Permissions For** Choose whether you want to display security permissions for trusted documents or other (nontrusted) documents.

**Allow Multimedia Operations** Select this option to allow media clips to be played. When selected, you can change the permission settings for a particular player and enable options that determine the appearance of the media during playback.

**Change Permission Settings For A Player** Select the player in the list, and then choose one of the following options from the menu:

- **Always** Allows the player to be used without prompting.
- **Never** Prevents the player from being used.
- **Prompt** Asks the user whether the player can be used. If you select this option and allow the player to play the media in a particular document, that document becomes trusted.

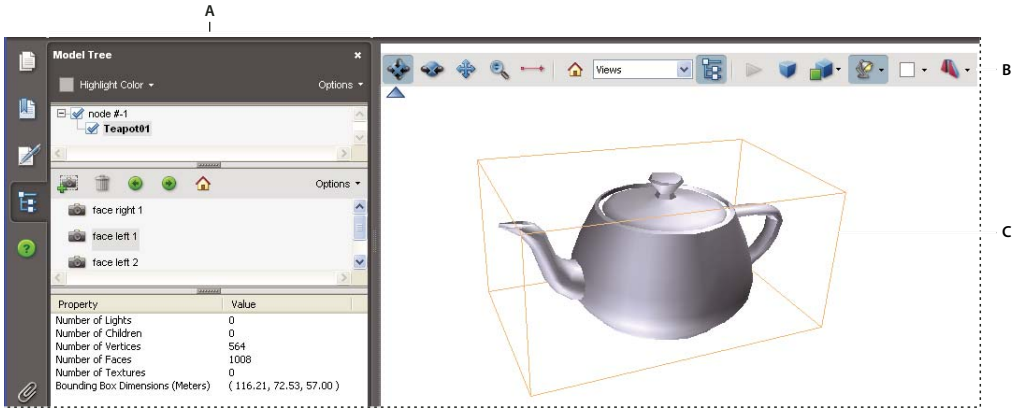
**Clear Your List Of Trusted Documents** Deletes the current list of trusted documents and authors. Use this option to prevent media from playing in documents that were previously trusted documents or created by trusted authors. This option is available only when a PDF that contains multimedia is open.

# Interacting with 3D models

## Displaying 3D models

In Acrobat, you can view and interact with high-quality 3D content created in professional 3D CAD or 3D modeling programs and embedded in PDFs. For example, you can selectively hide and show parts of a 3D model, remove a cover to look inside, and turn parts around as if holding them in your hands.

3D content may initially appear as a two-dimensional preview image. Clicking the 3D model with the Hand or Select tool enables (or activates) the model, opens the 3D toolbar, and plays any animation.




*Selected 3D object*
***A.*** *Model Tree* ***B.*** *3D toolbar* ***C.*** *3D object*

***Note:*** *Creating PDFs from 3D models requires Adobe Acrobat 3D. Acrobat Professional users can add 3D models to PDFs.*

## 3D toolbar overview

The 3D toolbar appears after you click the 3D model with the Hand tool, which also enables the 3D model and plays any animations associated with it. The 3D toolbar always appears in the area above the upper left corner of the 3D model and cannot be moved. A small blue triangle appears immediately below the 3D toolbar, which you can click to hide and show the toolbar.

***Note:*** *You can disable or enable the blue triangle toggle by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), selecting 3D under Categories, and then clicking the Enable Toggle For 3D Toolbar Control option.*

You can use the 3D toolbar to zoom in and out, rotate, and pan across the object. Use the Model Tree to hide or isolate parts, or make parts transparent.

You manipulate a 3D model by selecting and dragging various 3D navigation tools. When you navigate in 3D, it may help to think of it as viewing the stationary 3D model from a camera's perspective. You can rotate, pan (move up, down, or side-to-side), and zoom in or out.

***Note:*** *You can hide the toolbar by right-clicking/Control-clicking the 3D model and choosing Hide Toolbar. To show the toolbar, choose Show Toolbar from the same context menu.*

### 3D navigation tools

**Rotate** Turns 3D objects around relative to the screen. How the objects move depends on the starting view, where you start dragging, and the direction you drag, such as in a straight line or in curves, circles, or loops.

***Note:*** *You can also use the Hand tool to rotate an object if Enable 3D Selection For The Hand Tool is selected in the 3D panel of the Preferences dialog box.*

**Spin** Turns a 3D model in parallel to two fixed axes in the 3D model, the x-axis and the z-axis.

**Pan** Moves the model vertically and horizontally only. You can also pan with the Hand tool: Ctrl-drag/Command-drag.

**Zoom** Moves you toward, or away from, objects in the scene when you drag vertically. You can also zoom with the Hand tool by holding down Shift as you drag.

**Walk** Pivots horizontally around the scene when you drag horizontally; moves forward or backward in the scene when you drag vertically; maintains a constant elevation level, regardless of how you drag.The Walk tool is especially useful for architectural 3D models. To change the walking speed, change the default display units in the Preferences (3D).

***Note:*** *The Walk tool is available when you select the Preferences setting that consolidates tools or when you right-click /Control-click the 3D model and choose Tools > Walk.*

**3D Measurement Tool** Measures part sizes and distances in the 3D model.

*(Windows) Use the right mouse button to change the way several of the 3D navigation tools work. For the Rotate and Spin tools, right-click dragging temporarily shifts to the Zoom tool. For the Zoom tool, it makes the tool function like a Marquee Zoom tool, zooming to the area that you define when you drag. For the Walk tool, right-click dragging makes the tool function as the Pan tool. (Mac OS) If you have a one-button mouse, you can Control-drag or Option-drag to make the Rotate and Spin tools temporarily act as the Pan tool.*

### 3D toolbar view controls

**Default View** Returns to a preset zoom, pan, rotation, and projection mode of the 3D model. You can use the Options menu in the View pane of the Model Tree or the Manage Views command on the 3D toolbar Views menu to set a different view as the default.

*If an object ever moves out of your view, you have, in essence, turned your camera completely away from the object. Click the Default View icon on the 3D toolbar to move the object back into view.*

**Views menu** Lists any views defined for the current 3D model.

**Toggle Model Tree** Opens and hides the Model Tree.

**Play/Pause Animation** Plays or pauses any JavaScript-enabled animation. The Play/Pause Animation pop-up menu opens a slider that you can drag back and forth to move to different times in the animation sequence.

**Projection** Toggles between using perspective and orthographic projection of the 3D object.

**Model Render Mode menu** Determines how the 3D shape appears. For an illustrated guide, see "Examples of model rendering modes" on page 291.

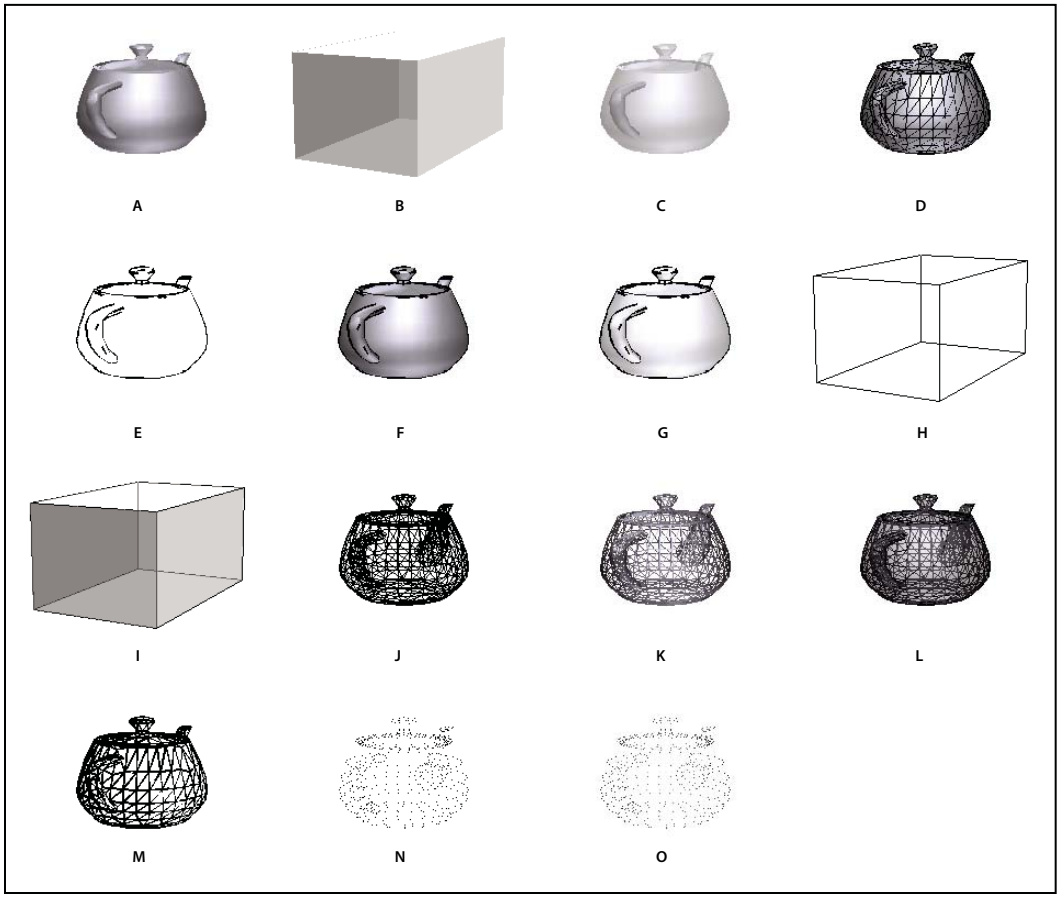
**Enable Extra Lighting menu** Lists the different lighting effects, in which the number, color, orientation, and brightness of the lights, the reflectivity of the surface, and other factors affect the illumination of the 3D object. Experiment to get the visual effects you want.

**Background Color swatch** Opens the color picker, which you can use to select a different color for the space surrounding the 3D object.

**Toggle Cross Section** Shows and hides cross sections of the object. Click the pop-up button to open the Cross Section Properties dialog box. For more information, see "Create cross sections" on page 295.

## Examples of model rendering modes

The model rendering modes include combinations of factors that affect the appearance of the 3D object. The illustration below shows a simple object rendered in each of the available modes.



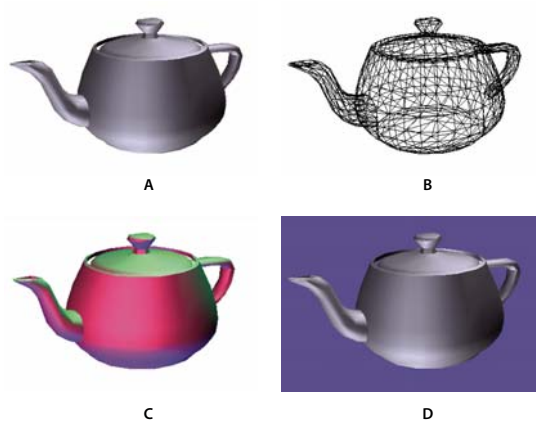

*Model rendering modes*
***A.*** *Solid* ***B.*** *Transparent Bounding Box* ***C.*** *Transparent* ***D.*** *Solid Wireframe* ***E.*** *Illustration* ***F.*** *Solid Outline* ***G.*** *Shaded Illustration* ***H.*** *Bounding Box* ***I.*** *Transparent Bounding Box Outline* ***J.*** *Wireframe* ***K.*** *Shaded Wireframe* ***L.*** *Transparent Wireframe* ***M.*** *Hidden Wireframe* ***N.*** *Vertices* ***O.*** *Shaded Vertices*

## Editing 3D models

Use a 3D authoring application to make changes to your 3D source images.

## Change rendering mode, lighting, projection, and background

The model rendering mode determines the surface appearance of the 3D model. The default rendering mode is usually solid, but you can also choose another rendering mode. You can also change the lighting of the 3D model as well as the background.




*Changing the appearance of the 3D model*
***A.** Default appearance **B.** Wireframe rendering mode **C.** Colored lighting **D.** Different background color*

❖ Use items on the 3D toolbar to make any of these changes:

- To change the rendering mode, choose an option from the Model Render Mode pop-up menu .
- To view an orthographic projection, click the Use Orthographic Projection button . An *orthographic projection* effectively removes a dimension, preserving the size ratio between objects but giving the 3D model a less realistic appearance. Click the button again to use perspective projection.
- To turn lighting on or off or to change lighting, choose an option from the Enable Extra Lighting pop-up menu .
- To change the background color, click the arrow next to the Background Color swatch and choose a color.

***Note:** Model rendering modes, lighting schemes, and background color options are also available by right-clicking/Control-clicking the 3D model. Model rendering modes also appear under the Options menu on the Model Tree.*

### See also

"Examples of model rendering modes" on page 291

## Model Tree overview

The Model Tree appears in the navigation pane on the left side of the work area. You can also open the Model Tree by clicking the Toggle Model Tree button on the 3D toolbar, or by right-clicking/Control-clicking the 3D model and choosing Show Model Tree.

***Note:** Using the Model Tree requires version 7.0.7 or later of either Acrobat or Adobe Reader. Users with earlier versions can interact with 3D models but not with the Model Tree.*

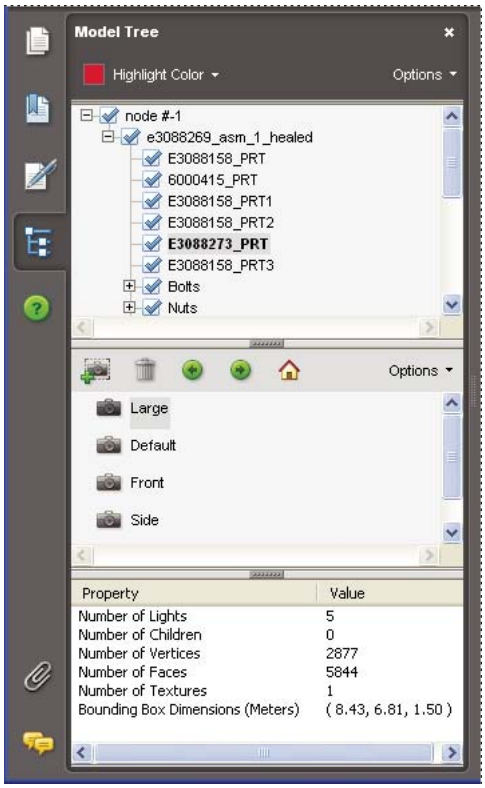
The Model Tree has three panes, each of which displays a specific type of information or controls.

**Structure pane** The topmost pane shows the tree structure of the 3D object. For example, a 3D object depicting a car may have separate groups of objects (called *nodes*) for the chassis, engine, and wheels. In this pane, you can move through the hierarchy and select, isolate, or hide various parts.

Product Manufacturing Information (PMI) appears as a group of items on the same hierarchical level as its related object or assembly.

**View pane** The middle pane lists the defined views, which you can add to and edit. For example, after you isolate and rotate a part, you can save that particular view. After making other transformations, you can simply click the view you created to return the 3D model to the view that you saved earlier. See "Set 3D views" on page 299.

**Object Data pane** The lower pane displays other information, including properties and metadata, if any, about the object or part. You cannot edit this information for 3D objects in Acrobat.



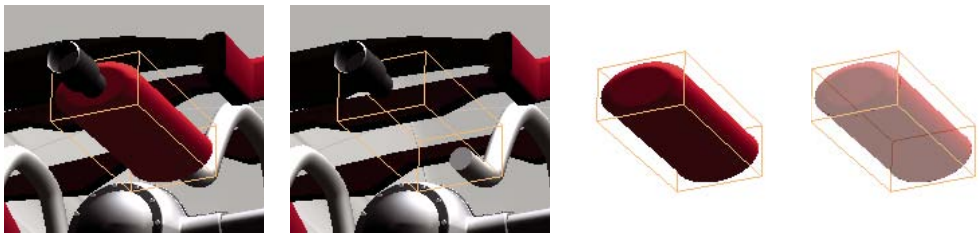

*Model Tree*
***A.*** *3D object's hierarchy* ***B.*** *Saved views* ***C.*** *Part or object information*

***Note:*** *You can change the default behavior for the Model Tree by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), selecting 3D under Categories, and then choosing an option from the Open Model Tree On 3D Activation menu.*

In some instances, the author of the PDF can set up a 3D model in the conversion settings so that clicking it automatically displays the Model Tree.

## Hide, isolate, and change the appearance of parts

Some 3D models are composed of individual parts. You can use the Model Tree to hide or isolate parts, zoom in to parts, or make parts transparent. Parts that show in the 3D model appear in the tree with a check mark next to them.




*Manipulating parts*
***A.** Selected part **B.** Hidden part **C.** Isolated part **D.** Transparent part*

**1** In the 3D model, use the Hand tool to click the part you want to manipulate. If a preference setting prevents you from using the Hand tool, use the Object Data tool (Tools > Object Data > Object Data Tool) to select parts. Or, select the part in the Model Tree list.

**2** From the Options menu in the top pane of the Model Tree, choose any of the following:

***Note:** The items that appear on the Options menu and the order in which they are listed depend on whether the selected 3D model is composed of just one part or multiple parts. Many of these options are also available by right-clicking/Control-clicking a part in the 3D model.*

**Model Render Mode** Changes the surface appearance of the entire 3D model according to the item you choose from the submenu: Transparent Bounding Box, Solid, Transparent, Solid Wireframe, and so on.

**Show All Parts** Displays the entire 3D model.

**Fit Visible** Displays all visible parts and centers them in the view.

**Display Bounding Box** Displays the box that encloses the 3D object or selected parts of the model.

**Set Bounding Box Color** Changes the color of the bounding box. Choose this option, select a color, and then click OK.

**Hide** Displays the model without showing the selected parts. You can also select and deselect check boxes in the top pane of the Model Tree to hide and show different parts.

**Isolate** Displays only the selected part, hiding all others.

**Zoom To Part** Changes the center focus from the entire 3D model to the selected parts. This setting is especially useful for rotating a part, allowing the rotation to occur around the part's center focus rather than that of the entire model.

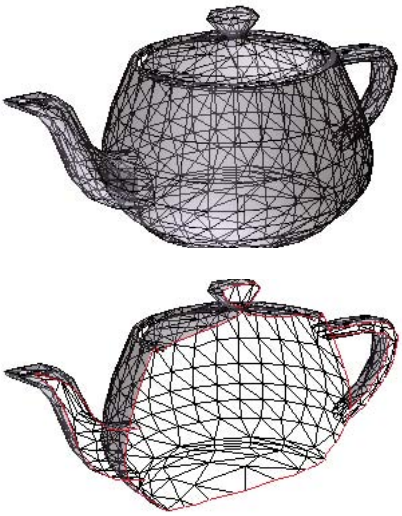
**Transparent** Displays a see-through version of the selected part.

**Export As XML** Creates a separate XML file of either Whole Tree or Current Node of the 3D model.

***Note:** If the 3D model was created to include Product Manufacturing Information (PMI), options for showing and hiding the PMI may be available on this menu.*

## Create cross sections

Displaying a cross section of a 3D model is like cutting it in half and looking inside. Use the Cross Section Controls dialog box to adjust the alignment, offset, and tilt of the cutting plane.



*Before and after cross section*

**1** Click the Toggle Cross Section icon on the 3D toolbar to turn on or off the cross section.

**2** (Optional) Click the arrow next to the Toggle Cross Section icon, and choose Cross Section Properties, which opens the Cross Section Controls dialog box. Then do any of the following:

- Change settings under Alignment, Display Settings, and Position And Orientation.
- Click the Save Section View button to save the current cross-sectional view. (The saved view will appear on the Views menu in the 3D toolbar and in the View pane of the Model Tree with a default name, SectionView*[n]*.)

### Cross Section Controls options

Changes you make here are applied immediately. To see these changes, make sure that the Cross Section Controls window does not block your view of the active 3D model. The Cross Section Controls window remains on top if you focus or interact with the underlying PDF. To close it, click the Close button in the upper right corner.

**Enable Cross Section** When selected, makes the other options available.

**Alignment** Determines the axis (*x, y,* or *z)* to which the cross section aligns.

**Align To Face** Cuts the cross section on a plane defined by the surface of any face that you then click in the 3D model.

**Align To 3 Points** Cuts the cross section on a plane defined by any three points that you click on the 3D model.

**Show Intersections** Indicates where the cutting plane slices the 3D model by adding a colored outline. Click the color swatch if you want to select a different color.

**Show Cutting Plane** Displays the two-dimensional field that cuts the 3D model. Click the color swatch if you want to select a different color, and enter a different percentage if you want to change the opacity of the plane.

**Align Camera With Cutting Plane** Rotates the 3D model so that it's level with the cross section's cutting plane.

**Offset** Determines how much of the 3D model is sliced. Drag the slider left or right, or change the percentage.

*To understand how each axis divides the 3D model, select an axis and then drag the Offset slider back and forth and observe the changes in the embedded 3D model.*

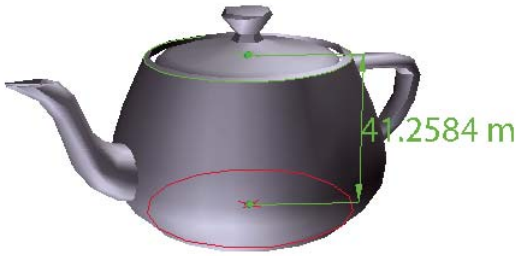
**Flip** Reverses the cross section. For example, if the top half of the model is cut off in the cross section, clicking Flip displays the top half and cuts off the bottom half.

**Tilt sliders** Determine the angles between the cutting plane and the axes. Drag the sliders left or right, or change the percentages.

**Save Section View** Adds the current cross-sectional view to the lists in the 3D toolbar and Model Tree, where you can select it to return the model to this view. The saved view is given a default name, SectionView*[n]*.

## Measure 3D objects

Use the 3D Measurement Tool to measure 3D models. You can create measurements between combinations of points or edges of the 3D model. As you move the pointer over the 3D model, specific points and edges are highlighted. The 3D Measurement Tool supports four types of measurements: perpendicular distance between two straight edges, linear distance between two points, the radius of circular edges, and the angle between two edges (or three points). You can also display comments while taking measurements. However, these comments (also called measurement markups) are not preserved after the document is closed.




*3D measurement display*

**1** Click a 3D model in a PDF to enable it.

**2** Click the 3D Measurement Tool icon on the 3D toolbar. (If the 3D toolbar view is set for consolidated tools, the 3D Measurement tool is available on the pop-up menu under the Rotate, Spin, Pan, Zoom, or Walk tool.)

**3** Select the options you want in the Snap Enables, Measurement Types, and Units And Markup Settings areas of the 3D Measurement Tool palette.

**4** Under Units And Markup Settings, change the options, as needed. Leave the 3D Measurement Tool palette open.

**5** Measure the 3D model:

- To measure the distance between two positions on the 3D model, click to set a start point and move the pointer to another location or an edge.
- To measure the circumference of a round shape, move the pointer to the edge of the shape so that a circle appears, and click once.
- To create and set the position of an annotation on the measurement, select Measurement Markup in the 3D Measurement Tool palette and then type a markup message in Annotation. Measure the 3D model as described above, but click to set the end point for the measurement and then click a third time to set the location of the measurement and annotation text.
- To discontinue a measurement, right-click/Control-click and choose Cancel Measurement.
- To delete a measurement markup, click it with the 3D Measurement Tool and press Delete.

*While you measure, you can Alt-drag/Command-drag to rotate. Hold down Shift and drag to pan. Hold down Alt+Shift/Command+Shift and drag to zoom. Hold down Ctrl to disable snap.*

### Snap Enables options in the 3D Measurement Tool palette

**3D Snap To Edge Endpoints** Snaps to the entire edge.

**3D Snap To Linear Edges** Snaps to a straight-line segment of an edge.

**3D Snap To Radial Edges** Snaps to a circumference.

**3D Snap To Silhouettes** Snaps to the apparent edge of a part, such as the side of a cylinder.

**3D Snap To Planar Faces** Snaps to the geometric plane making up a face of the part.

### Measurement Types options in the 3D Measurement Tool palette

**3D Point To Point Measurement** Measures the distance between two positions on the 3D model that you click to set a start point and then click another location to set an end point or edge.

**3D Perpendicular Dimension** Measures the distance between two edges taken at a right angle to the starting edge.

**3D Radial Dimension** Measures the radius at the location clicked.

**3D Angle Measurement** Measures the angle between two edges.

### Units And Markup options in the 3D Measurement Tool palette

***Note:*** *If you do not see these settings, choose Show Details on the palette's Options menu.*

**Model Units Scale Ratio** Shows the relationship between units in the model and real object measurements. Use the Display Units menu to select a different unit for the real object measurements.

**Measurement Markup** Select to have the measurements appear as comments in the PDF.

**Label** Type text that you want to appear with the measurement, both in the 3D model area and in the Comments panel. (Not available if Measurement Markup is not selected.)

### 3D Measurement Tool viewing options

Use the Options menu in the 3D Measurement tool palette to set viewing options.

***Note:*** *The 3D Measurement Tool palette changes to the Distance Tool palette after a brief delay when the pointer moves outside the canvas area of the 3D model. Moving the pointer back over the 3D model restores the 3D Measurement Tool options. The Ortho option is available only for the 2D Distance, Perimeter, and Area tools.*

**Show Details** Shows or hides the Cursor Location and Units And Markup Settings options in the 3D Measurement Tool palette.

**Show Rulers** Shows or hides vertical and horizontal rulers on the page. (Has the same effect as choosing View > Rulers.)

**Snap To 2D Content** Ensures precise measurement in 2D objects.

**Snap To 3D Content** Ensures precise measurement in 3D objects

**3D Measurement Navigation Tips** Opens a dialog box with keyboard shortcuts for several 3D features. You can use these shortcuts while you are measuring.

## Measuring preferences

Change the 3D Measuring preferences to determine how 3D data is measured. These options appear in the Measuring (3D) panel of the Preferences dialog box.

**Use Scales And Units From Model (When Present)** Displays measurements based on the model units, if present, generated from the original 3D model. Deselect this option to specify the units of measurements manually. This setting can be changed in the 3D Measurement Tool palette.

**Use Default Display Unit** Uses units of measurement that you specify here rather than those in the 3D model.

**Significant Digits To Display** Specifies the maximum number of digits in the measurement number.

**3D Measuring Line Color** Specifies the color of the line that appears when you click or drag to measure an object.

**Measure Feedback Size** Sets the text size for the measurement display.

**Angular Measurements Shown In** Specifies units as either degrees or radians.

**Circular Measurements Shown As** Designates whether the diameter or radius is measured for circular parts.

**3D Snap Settings** Turns on snap and specifies whether points, arcs, edges, silhouette edges, or faces are snapped to. Sensitivity indicates how close the pointer needs to be to the item being snapped to. For Snap Hint Color, specify the color of the snap line that appears when you hold the pointer over the 3D object.

## Set 3D views

The default view of a 3D model lets you quickly revert to a starting point at any time as you interact with the model. A default view is different from a preview, which determines what the 3D model looks like when it's not activated. The list of all available views for the 3D model appears in the Views menu on the 3D toolbar and in the View pane of the Model Tree.

You can also create additional views of the 3D model in Acrobat that let you quickly navigate the 3D content as you want (such as top, bottom, left, right, inside, outside, exploded, or assembled). A view can include lighting, camera position, rendering mode, the Model Tree state, and transparency and cross section settings. When you add a comment or markup to the 3D model, Acrobat automatically creates a view.

You can link views to bookmarks in the Bookmarks panel, or you can use the Go To 3D View action to link views to buttons and links that you create on the page.

### Create a new view

1. With the Hand tool, click the 3D model to enable it.
2. Use the Rotate, Pan, and Zoom tools in the 3D toolbar to change the view.
3. In the Model Tree, click the Create View icon .

### Display a view

❖ Use these methods to change the view, as appropriate:

- From the 3D toolbar, select the view from the Views pop-up menu.
- In the Model Tree, click the view name.
- Click the Default View icon .

### Change the default view

❖ In the View pane of the Model Tree, do one of the following:

- Select a view, and then choose Set As Default View from the Options menu.
- Right-click/Control-click a view, and then choose Set As Default View.

### Add a 3D view to a bookmark or link

This process requires a 3D model with one or more defined views, which you can create. You can associate the view with an existing bookmark or link, or you can create a new one for this purpose.

**1** Do one of the following:

- To create a new bookmark, click the New Bookmark button at the top of the Bookmarks panel, and type a new name for the bookmark. Then, right-click/Control-click it and choose Properties.
- To create a new link, choose Tools > Advanced Editing > Link Tool, and drag to create a link rectangle anywhere on the page. Then, under Link Action, in the Create Link dialog box, select Custom Link, and click Next.
- To link a view to an existing bookmark or link, right-click/Control-click the bookmark or link, and choose Properties.

**2** In the Properties dialog box, click the Actions tab.

**3** From the Select Action menu, choose Go To A 3D View, and then click Add.

**4** In the Select A 3D View dialog box, select the 3D annotation for the 3D model from the list on the left, and then select a view option on the right:

**Current View** Matches the 3D rotation, pan, and zoom characteristics that are active in your document at the time you create the link or bookmark, whether or not this view is listed on the Model Tree as a defined view.

**First View** Changes to the view that appears at the top of the list in the Model Tree.

**Last View** Changes to the view definition that appears at the bottom of the list in the Model Tree.

**Previous View** Moves up the Model Tree list of defined views, one view at a time.

**Next View** Moves down the Model Tree list of defined views, one view at a time.

**Named View** Changes to the defined view that you select from the list appearing below this option.

**5** (Optional) To make a bookmark or link also jump to a specific page and page view, choose Go To A Page View on the Selection Action menu, and click Add. Then use the scroll bars and zoom tools to adjust the page view before you click the Set Link button. When finished, click Close in the Properties dialog box.

### Delete a 3D view

❖ Do one of the following:

- On the 3D toolbar, open the Views pop-up menu and choose Manage Views. Select the views you want to remove, and click Delete View.
- In the View pane of the Model Tree panel, select the views you want to remove. From within the View pane, either click the Delete button or click the Options button and choose Delete View.

## 3D preferences

In the 3D panel of the Preferences dialog box—Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS)—you can determine whether the 3D toolbar and Model Tree are displayed by default. You can also specify a default renderer and determine whether animations are allowed.

**Preferred Renderer** Specifies the rendering engine used to affect both performance and quality, so it's important to select the appropriate renderer. Depending on your system, you may want to change your render engine. For Windows XP, you may be able to select DirectX 8, DirectX 9, or Software. For Mac OS 10.3 or later, you can select OpenGL or Software. If you select a DirectX or OpenGL option, all rendering takes place using the graphics chip on the video card. If Software is selected, rendering may take more time, but the performance may be more consistent with that of the model in its originating application.

**Enable Double-Sided Rendering** Some model parts have two sides. To save time and space, you can deselect this option to render only the side facing the user. If the user looks inside a part rendered with only one side, the back side would be invisible.

**Preferred 3D PMI Rendering Mode** Specifies the PMI mode to use for rendering. You can select one of the following options:

Use Content Setting—The rendering of the PMI uses the setting of each PMI to decide whether or not it uses the Z-buffer.

Always Render 3D PMI In Front Of Model—The rendering of the PMI ignores the Z-buffer regardless of the setting in the file.

Always Render 3D PMI Using Z-buffer—The rendering of the PMI always turns on Z-buffer regardless of the setting in the file.

**Enable Hardware Rendering For Legacy Video Cards** Forces the use of a hardware accelerator for even video cards that do not support a pixel shader.

**Open Model Tree On 3D Activation** Determines whether the Model Tree is displayed when the 3D model is activated. Choose Use Annotation's Setting to use whichever setting the author used when adding the 3D model to the PDF.

**Default Toolbar State** Determines whether the 3D toolbar is shown or hidden when a 3D model is activated. Choose Use Annotation's Setting to use whichever setting the author used when adding the 3D model to the PDF.

**Enable Toggle For 3D Toolbar Control** Places a triangular button over the selected 3D model that hides or displays the 3D toolbar.

**Enable 3D Selection For The Hand Tool** Lets the user select and highlight parts of the 3D model using the Hand tool. If this option is not selected, use the Object Data tool (Tools > Object Data > Object Data Tool) to select the object.

**Consolidate 3D Tools On The 3D Toolbar** Selecting this option places the manipulation and navigation tools under the Rotate tool, thereby shortening the 3D toolbar.

**Enable View Transitions** Some 3D models include animated transitions between views. Deselect this option if you want to prevent this 3D animation.

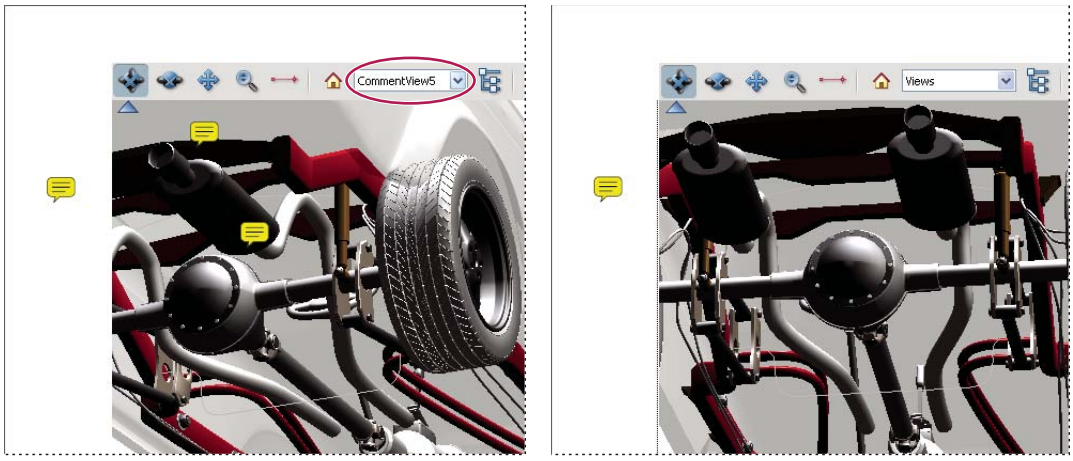
**Optimization Scheme For Low Framerate** Specifies what happens to animations of complex models when the framerate becomes low. None does not compromise the visuals and leaves the framerate low. Bounding Box shows the three-dimensional planes enclosing the parts instead of the parts themselves, which keeps the framerate high. Drop Objects does not show some parts of the model in order to keep the framerate high.

**Framerate Threshold** Sets the minimum framerate, either by dragging the slider or entering a number in the value box. If the framerate drops below that number of frames per second, the Optimization Scheme For Low Framerate option goes into effect.

## Comment on 3D designs

Comments added to a 3D object are associated with specific views that are defined when the comments are added. If the view is changed—for example, if the 3D object is rotated or moved—the comments are no longer visible.

***Note:*** *Adding comments to 3D model views requires version 7.0.7 or later of Acrobat or Reader.*




*When the view of a 3D object is changed, any comment associated with that object disappears (right).*

*If you don't want a comment to be associated with a 3D view, add the comment to another part of the page, outside the 3D object area.*

### See also

"Commenting" on page 158

#### Add comments to a 3D object

***Note:*** *Adobe Reader users can add comments to a PDF if the document author enables commenting for that PDF.*

**1** Select a tool from the Comment & Markup toolbar. (The Text Edit tools have no effect on 3D objects.)

**2** Click inside the 3D object area to create a new comment and also a new view definition in the Model Tree with a default name such as "CommentView1."

**3** To add more comments, do one of the following:

- To create an additional comment in a view, make sure that the commenting view you want is selected in the Model Tree, and click inside the 3D object area.
- To create an additional comment in a new commenting view, make sure that no commenting view is selected in the Model Tree, and click inside the 3D object area.

***Note:*** *If you delete one of these automatically generated commenting views, the associated comments are still available. You can view and select them in the Comments panel or in the Model Tree, where they are listed under the views. Selecting a comment switches the 3D model to the same viewing configuration it had when the comment was added.*

### Display comments for a 3D object

**1** Do one of the following:

- In the Model Tree, select a view that contains comments.
- Click the Comments button or choose View > Navigation Panels > Comments.
- In the View pane of the Model Tree, click Options and choose List Comments.

**2** Double-click a comment to open its comment window.

**3** Repeat steps 1 and 2 as needed to see other comments associated with other views.

When you select a comment, the 3D model appears in the same viewing configuration it had when the comment was added, whether or not that view has been deleted from the list.

## Run a JavaScript

If there is a separate JavaScript file associated with the 3D model PDF, you can activate it.

**1** Open the PDF in Acrobat.

**2** Right-click/Control-click the 3D model in the PDF, and choose Run JavaScript.

# Chapter 14: Color management

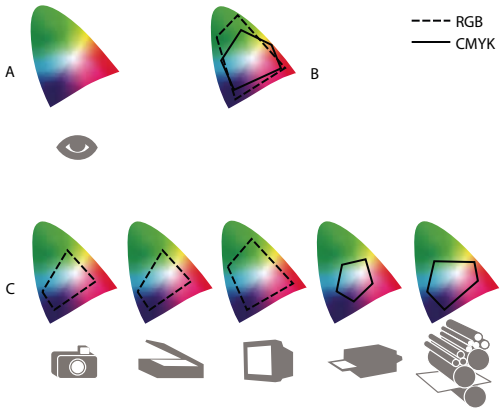
## Understanding color management

### Why colors sometimes don't match

No device in a publishing system is capable of reproducing the full range of colors viewable to the human eye. Each device operates within a specific color space that can produce a certain range, or *gamut*, of colors.

A color model determines the relationship between values, and the color space defines the absolute meaning of those values as colors. Some color models (such as CIE L*a*b) have a fixed color space because they relate directly to the way humans perceive color. These models are described as being *device-independent*. Other color models (RGB, HSL, HSB, CMYK, and so forth) can have many different color spaces. Because these models vary with each associated color space or device, they are described as being *device-dependent*.

Because of these varying color spaces, colors can shift in appearance as you transfer documents between different devices. Color variations can result from differences in image sources; the way software applications define color; print media (newsprint paper reproduces a smaller gamut than magazine-quality paper); and other natural variations, such as manufacturing differences in monitors or monitor age.




*Color gamuts of various devices and documents*
***A.** Lab color space **B.** Documents (working space) **C.** Devices*

### What is a color management system?

Color-matching problems result from various devices and software using different color spaces. One solution is to have a system that interprets and translates color accurately between devices. A color management system (CMS) compares the color space in which a color was created to the color space in which the same color will be output, and makes the necessary adjustments to represent the color as consistently as possible among different devices.

A color management system translates colors with the help of *color profiles*. A profile is a mathematical description of a device's color space. For example, a scanner profile tells a color management system how your scanner "sees" colors. Adobe color management uses ICC profiles, a format defined by the International Color Consortium (ICC) as a cross-platform standard.

Because no single color-translation method is ideal for all types of graphics, a color management system provides a choice of *rendering intents*, or translation methods, so that you can apply a method appropriate to a particular graphics element. For example, a color translation method that preserves correct relationships among colors in a wildlife photograph may alter the colors in a logo containing flat tints of color.

***Note:*** *Don't confuse color management with color correction. A color management system won't correct an image that was saved with tonal or color balance problems. It provides an environment where you can evaluate images reliably in the context of your final output.*

### See also

"About color profiles" on page 315

"About rendering intents" on page 324

## Do you need color management?

Without a color management system, your color specifications are device-dependent. You might not need color management if your production process is tightly controlled for one medium only. For example, you or your print service provider can tailor CMYK images and specify color values for a known, specific set of printing conditions.

The value of color management increases when you have more variables in your production process. Color management is recommended if you anticipate reusing color graphics for print and online media, using various kinds of devices within a single medium (such as different printing presses), or if you manage multiple workstations.

You will benefit from a color management system if you need to accomplish any of the following:

- Get predictable and consistent color output on multiple output devices including color separations, your desktop printer, and your monitor. Color management is especially useful for adjusting color for devices with a relatively limited gamut, such as a four-color process printing press.
- Accurately soft-proof (preview) a color document on your monitor by making it simulate a specific output device. (Soft-proofing is subject to the limitations of monitor display, and other factors such as room lighting conditions.)
- Accurately evaluate and consistently incorporate color graphics from many different sources if they also use color management, and even in some cases if they don't.
- Send color documents to different output devices and media without having to manually adjust colors in documents or original graphics. This is valuable when creating images that will eventually be used both in print and online.
- Print color correctly to an unknown color output device; for example, you could store a document online for consistently reproducible on-demand color printing anywhere in the world.

## Creating a viewing environment for color management

Your work environment influences how you see color on your monitor and on printed output. For best results, control the colors and light in your work environment by doing the following:

- View your documents in an environment that provides a consistent light level and color temperature. For example, the color characteristics of sunlight change throughout the day and alter the way colors appear on your screen, so keep shades closed or work in a windowless room. To eliminate the blue-green cast from fluorescent lighting, you can install D50 (5000° Kelvin) lighting. You can also view printed documents using a D50 lightbox.

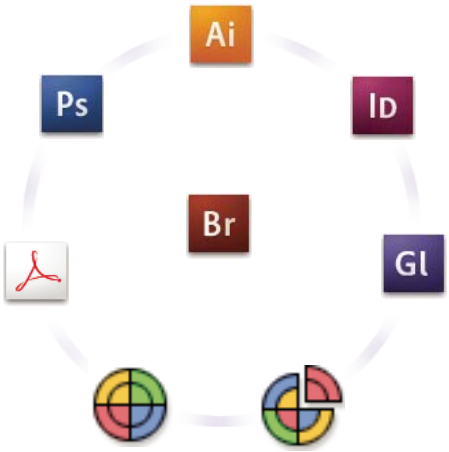
- View your document in a room with neutral-colored walls and ceiling. A room's color can affect the perception of both monitor color and printed color. The best color for a viewing room is neutral gray. Also, the color of your clothing reflecting off the glass of your monitor may affect the appearance of colors on-screen.
- Remove colorful background patterns on your monitor desktop. Busy or bright patterns surrounding a document interfere with accurate color perception. Set your desktop to display neutral grays only.
- View document proofs in the real-world conditions under which your audience will see the final piece. For example, you might want to see how a housewares catalog looks under the incandescent light bulbs used in homes, or view an office furniture catalog under the fluorescent lighting used in offices. However, always make final color judgements under the lighting conditions specified by the legal requirements for contract proofs in your country.

# Keeping colors consistent

## About color management in Adobe applications

Adobe color management helps you maintain the appearance of colors as you bring images in from external sources, edit documents and transfer them between Adobe applications, and output your finished compositions. This system is based on conventions developed by the International Color Consortium, a group responsible for standardizing profile formats and procedures so that consistent and accurate color can be achieved throughout a workflow.

By default, color management is turned on in color-managed Adobe applications. If you purchased the Adobe Creative Suite, color settings are synchronized across applications to provide consistent display for RGB and CMYK colors. This means that colors look the same no matter which application you view them in.




*Color settings for Adobe Creative Suite are synchronized in a central location through Adobe Bridge.*

If you decide to change the default settings, easy-to-use presets let you configure Adobe color management to match common output conditions. You can also customize color settings to meet the demands of your particular color workflow.

Keep in mind that the kinds of images you work with and your output requirements influence how you use color management. For example, there are different color-consistency issues for an RGB photo printing workflow, a CMYK commercial printing workflow, a mixed RGB/CMYK digital printing workflow, and an Internet publishing workflow.

## Basic steps for producing consistent color

**1. Consult with your production partners (if you have any) to ensure that all aspects of your color management workflow integrate seamlessly with theirs.**

Discuss how the color workflow will be integrated with your workgroups and service providers, how software and hardware will be configured for integration into the color management system, and at what level color management will be implemented. (See "Do you need color management?" on page 305.)

**2. Calibrate and profile your monitor.**

A monitor profile is the first profile you should create. Seeing accurate color is essential if you are making creative decisions involving the color you specify in your document. (See "Calibrate and profile your monitor" on page 317.)

**3. Add color profiles to your system for any input and output devices you plan to use, such as scanners and printers.**

The color management system uses profiles to know how a device produces color and what the actual colors in a document are. Device profiles are often installed when a device is added to your system. You can also use third-party software and hardware to create more accurate profiles for specific devices and conditions. If your document will be commercially printed, contact your service provider to determine the profile for the printing device or press condition. (See "About color profiles" on page 315 and "Install a color profile" on page 318.)

**4. Set up color management in Adobe applications.**

The default color settings are sufficient for most users. However, you can change the color settings by doing one of the following:

- If you use multiple Adobe applications, use Adobe® Bridge CS3 to choose a standard color management configuration and synchronize color settings across applications before working with documents. (See "Synchronize color settings across Adobe applications" on page 308.)
- If you use only one Adobe application, or if you want to customize advanced color management options, you can change color settings for a specific application. (See "Set up color management" on page 308.)

**5. (Optional) Preview colors using a soft proof.**

After you create a document, you can use a soft proof to preview how colors will look when printed or viewed on a specific device. (See "Soft-proofing colors" on page 312.)

***Note:*** *A soft proof alone doesn't let you preview how overprinting will look when printed on an offset press. If you work with documents that contain overprinting, turn on Overprint Preview to accurately preview overprints in a soft proof.*

**6. Use color management when printing and saving files.**

Keeping the appearance of colors consistent across all of the devices in your workflow is the goal of color management. Leave color management options enabled when printing documents, saving files, and preparing files for online viewing. (See "Printing with color management" on page 314 and "Color-managing documents for online viewing" on page 311.)

## Synchronize color settings across Adobe applications

If you use Adobe Creative Suite, you can use Adobe Bridge to automatically synchronize color settings across applications. This synchronization ensures that colors look the same in all color-managed Adobe applications.

If color settings are not synchronized, a warning message appears at the top of the Color Settings dialog box in each application. Adobe recommends that you synchronize color settings before you work with new or existing documents.

**1** Open Bridge.

To open Bridge from a Creative Suite application, choose File > Browse. To open Bridge directly, either choose Adobe Bridge from the Start menu (Windows) or double-click the Adobe Bridge icon (Mac OS).

**2** Choose Edit > Creative Suite Color Settings.

**3** Select a color setting from the list, and click Apply.

If none of the default settings meet your requirements, select Show Expanded List Of Color Setting Files to view additional settings. To install a custom settings file, such as a file you received from a print service provider, click Show Saved Color Settings Files.

## Set up color management

**1** Do one of the following:

- (Illustrator, InDesign, Photoshop) Choose Edit > Color Settings.
- (Acrobat) Select the Color Management category of the Preferences dialog box.

**2** Select a color setting from the Settings menu, and click OK.

The setting you select determines which color working spaces are used by the application, what happens when you open and import files with embedded profiles, and how the color management system converts colors. To view a description of a setting, select the setting and then position the pointer over the setting name. The description appears at the bottom of the dialog box.

***Note:*** *Acrobat color settings are a subset of those used in InDesign, Illustrator, and Photoshop.*

In certain situations, such as if your service provider supplies you with a custom output profile, you may need to customize specific options in the Color Settings dialog box. However, customizing is recommended for advanced users only.

***Note:*** *If you work with more than one Adobe application, it is highly recommended that you synchronize your color settings across applications. (See "Synchronize color settings across Adobe applications" on page 308.)*

### See also

"Customize color settings" on page 320

## Change the appearance of CMYK black (Illustrator, InDesign)

Pure CMYK black (K=100) appears jet black (or rich black) when viewed on-screen, printed to a non-PostScript desktop printer, or exported to an RGB file format. If you prefer to see the difference between pure black and rich black as it will appear when printed on a commercial press, you can change the Appearance Of Black preferences. These preferences do not change the color values in a document.

**1** Choose Edit > Preferences > Appearance Of Black (Windows) or [*application name*] > Preferences > Appearance Of Black (Mac OS).

**2** Choose an option for On Screen:

**Display All Blacks Accurately** Displays pure CMYK black as dark gray. This setting allows you to see the difference between pure black and rich black.

**Display All Blacks As Rich Black** Displays pure CMYK black as jet black (RGB=000). This setting makes pure black and rich black appear the same on-screen.

**3** Choose an option for Printing/Exporting:

**Output All Blacks Accurately** When printing to a non-PostScript desktop printer or exporting to an RGB file format, outputs pure CMYK black using the color numbers in the document. This setting allows you to see the difference between pure black and rich black.

**Output All Blacks As Rich Black** When printing to a non-PostScript desktop printer or exporting to an RGB file format, outputs pure CMYK black as jet black (RGB=000). This setting makes pure black and rich black appear the same.

### Managing process and spot colors

When color management is on, any color you apply or create within a color-managed Adobe application automatically uses a color profile that corresponds to the document. If you switch color modes, the color management system uses the appropriate profiles to translate the color to the new color model you choose.

Keep in mind the following guidelines for working with process and spot colors:

- Choose a CMYK working space that matches your CMYK output conditions to ensure that you can accurately define and view process colors.
- Select colors from a color library. Adobe applications come with several standard color libraries, which you can load using the Swatches panel menu.
- (Acrobat, Illustrator, and InDesign) Turn on Overprint Preview to get an accurate and consistent preview of spot colors.
- (Acrobat, Illustrator, and InDesign) Use Lab values (the default) to display predefined spot colors (such as colors from the TOYO, PANTONE, DIC, and HKS libraries) and convert these colors to process colors. Using Lab values provides the greatest accuracy and guarantees the consistent display of colors across Creative Suite applications. If you want the display and output of these colors to match earlier versions of Illustrator or InDesign, use CMYK equivalent values instead. For instructions on switching between Lab values and CMYK values for spot colors, search Illustrator or InDesign Help.

***Note:*** *Color-managing spot colors provides a close approximation of a spot color on your proofing device and monitor. However, it is difficult to exactly reproduce a spot color on a monitor or proofing device because many spot color inks exist outside the gamuts of many of those devices.*

# Color-managing imported images

### Color-managing imported images (Illustrator, InDesign)

How imported images are integrated into a document's color space depends on whether or not the image has an embedded profile:

- When you import an image that contains no profile, the Adobe application uses the current document profile to define the colors in the image.

- When you import an image that contains an embedded profile, color policies in the Color Settings dialog box determine how the Adobe application handles the profile.

### See also

"Color management policy options" on page 322

## Using a safe CMYK workflow

A safe CMYK workflow ensures that CMYK color numbers are preserved all the way to the final output device, as opposed to being converted by your color management system. This workflow is beneficial if you want to incrementally adopt color management practices. For example, you can use CMYK profiles to soft-proof and hard-proof documents without the possibility of unintended color conversions occurring during final output.

Illustrator and InDesign support a safe CMYK workflow by default. As a result, when you open or import a CMYK image with an embedded profile, the application ignores the profile and preserves the raw color numbers. If you want your application to adjust color numbers based on an embedded profile, change the CMYK color policy to Preserve Embedded Profiles in the Color Settings dialog box. You can easily restore the safe CMYK workflow by changing the CMYK color policy back to Preserve Numbers (Ignore Linked Profiles).

You can override safe CMYK settings when you print a document or save it to Adobe PDF. However, doing so may cause colors to be reseparated. For example, pure CMYK black objects may be reseparated as rich black. For more information on color management options for printing and saving PDFs, search in Help.

### See also

"Color management policy options" on page 322

## Preparing imported graphics for color management

Use the following general guidelines to prepare graphics for being color-managed in Adobe applications:

- Embed an ICC-compliant profile when you save the file. The file formats that support embedded profiles are JPEG, PDF, PSD (Photoshop), AI (Illustrator), INDD (InDesign), Photoshop EPS, Large Document Format, and TIFF.
- If you plan to reuse a color graphic for multiple final output devices or media, such as for print, video, and the web, prepare the graphic using RGB or Lab colors whenever possible. If you must save in a color model other than RGB or Lab, keep a copy of the original graphic. RGB and Lab color models represent larger color gamuts than most output devices can reproduce, retaining as much color information as possible before being translated to a smaller output color gamut.

### See also

"Embed a color profile" on page 318

### View or change profiles for imported bitmap images (InDesign)

InDesign allows you to view, override, or disable profiles for imported bitmap images. This may be necessary when you are importing an image containing no profile or an incorrectly embedded profile. For example, if the scanner manufacturer's default profile was embedded but you have since generated a custom profile, you can assign the newer profile.

**1** Do one of the following:

- If the graphic is already in layout, select it and choose Object > Image Color Settings.
- If you're about to import the graphic, choose File > Place, select Show Import Options, select and open the file, and then select the Color tab.

**2** For Profile, choose the source profile to apply to the graphic in your document. If a profile is currently embedded, the profile name appears at the top of the Profile menu.

**3** (Optional) Choose a rendering intent, and then click OK. In most cases, it's best to use the default rendering intent.

***Note:*** *You can also view or change profiles for objects in Acrobat.*

#### See also

"Convert document colors to another profile (Photoshop)" on page 320

# Color-managing documents for online viewing

### Color-managing documents for online viewing

Color management for online viewing is very different from color management for printed media. With printed media, you have far more control over the appearance of the final document. With online media, your document will appear on a wide range of possibly uncalibrated monitors and video display systems, significantly limiting your control over color consistency.

When you color-manage documents that will be viewed exclusively on the web, Adobe recommends that you use the sRGB color space. sRGB is the default working space for most Adobe color settings, but you can verify that sRGB is selected in the Color Settings dialog box (Photoshop, Illustrator, InDesign) or the Color Management preferences (Acrobat). With the working space set to sRGB, any RGB graphics you create will use sRGB as the color space.

When working with images that have an embedded color profile other than sRGB, you should convert the image's colors to sRGB before you save the image for use on the web. If you want the application to automatically convert the colors to sRGB when you open the image, select Convert To Working Space as the RGB color management policy. (Make sure that your RGB working space is set to sRGB.) In Photoshop and InDesign, you can also manually convert the colors to sRGB using the Edit > Convert To Profile command.

***Note:*** *In InDesign, the Convert To Profile command only converts colors for native, not placed, objects in the document.*

#### See also

"About color working spaces" on page 320

"Color management policy options" on page 322

### Color-managing PDFs for online viewing

When you export PDFs, you can choose to embed profiles. PDFs with embedded profiles reproduce color consistently in Acrobat 4.0 or later running under a properly configured color management system.

Keep in mind that embedding color profiles increases the size of PDFs. RGB profiles are usually small (around 3 KB); however, CMYK profiles can range from 0.5 to 2 MB.

#### See also

"Printing with color management" on page 314

### Color-managing HTML documents for online viewing

Many web browsers do not support color management. Of the browsers that do support color management, not all instances can be considered color-managed because they may be running on systems where the monitors are not calibrated. In addition, few web pages contain images with embedded profiles. If you manage a highly controlled environment, such as the intranet of a design studio, you may be able to achieve some degree of HTML color management for images by equipping everyone with a browser that supports color management and calibrating all monitors.

You can approximate how colors will look on uncalibrated monitors by using the sRGB color space. However, because color reproduction varies among uncalibrated monitors, you still won't be able to anticipate the true range of potential display variations.

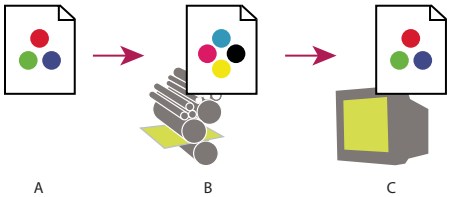
## Proofing colors

### Soft-proofing colors

In a traditional publishing workflow, you print a hard proof of your document to preview how its colors will look when reproduced on a specific output device. In a color-managed workflow, you can use the precision of color profiles to soft-proof your document directly on the monitor. You can display an on-screen preview of how your document's colors will look when reproduced on a particular output device.

Keep in mind that the reliability of the soft proof depends upon the quality of your monitor, the profiles of your monitor and output devices, and the ambient lighting conditions of your work environment.

***Note:*** *A soft proof alone doesn't let you preview how overprinting will look when printed on an offset press. If you work with documents that contain overprinting, turn on Overprint Preview to accurately preview overprints in a soft proof.*




*Using a soft proof to preview the final output of a document on your monitor*
***A.*** *Document is created in its working color space.* ***B.*** *Document's color values are translated to color space of chosen proof profile (usually the output device's profile).* ***C.*** *Monitor displays proof profile's interpretation of document's color values.*

## Soft-proof colors

**1** Choose View > Proof Setup, and do one of the following:

- Choose a preset that corresponds to the output condition you want to simulate.
- Choose Custom (Photoshop and InDesign) or Customize (Illustrator) to create a custom proof setup for a specific output condition. This option is recommended for the most accurate preview of your final printed piece.

**2** Choose View > Proof Colors to toggle the soft-proof display on and off. When soft proofing is on, a check mark appears next to the Proof Colors command, and the name of the proof preset or profile appears at the top of the document window.

*To compare the colors in the original image and the colors in the soft proof, open the document in a new window before you set up the soft proof.*

### Soft-proof presets

**Working CMYK** Creates a soft proof of colors using the current CMYK working space as defined in the Color Settings dialog box.

**Document CMYK (InDesign)** Creates a soft proof of colors using the document's CMYK profile.

**Working Cyan Plate, Working Magenta Plate, Working Yellow Plate, Working Black Plate, or Working CMY Plates (Photoshop)** Creates a soft proof of specific CMYK ink colors using the current CMYK working space.

**Macintosh RGB or Windows RGB (Photoshop and Illustrator)** Creates a soft proof of colors in an image using either a standard Mac OS or Windows monitor as the proof profile space to simulate. Both options assume that the simulated device will display your document without using color management. Neither option is available for Lab or CMYK documents.

**Monitor RGB (Photoshop and Illustrator)** Creates a soft proof of colors in an RGB document using your current monitor color space as the proof profile space. This option assumes that the simulated device will display your document without using color management. This option is unavailable for Lab and CMYK documents.

### Custom soft-proof options

**Device To Simulate** Specifies the color profile of the device for which you want to create the proof. The usefulness of the chosen profile depends on how accurately it describes the device's behavior. Often, custom profiles for specific paper and printer combinations create the most accurate soft proof.

**Preserve CMYK Numbers or Preserve RGB Numbers** Simulates how the colors will appear without being converted to the color space of the output device. This option is most useful when you are following a safe CMYK workflow.

**Rendering Intent (Photoshop and Illustrator)** When the Preserve Numbers option is deselected, specifies a rendering intent for converting colors to the device you are trying to simulate.

**Use Black Point Compensation (Photoshop)** Ensures that the shadow detail in the image is preserved by simulating the full dynamic range of the output device. Select this option if you plan to use black point compensation when printing (which is recommended in most situations).

**Simulate Paper Color** Simulates the dingy white of real paper, according to the proof profile. Not all profiles support this option.

**Simulate Black Ink** Simulates the dark gray you really get instead of a solid black on many printers, according to the proof profile. Not all profiles support this option.

*In Photoshop, if you want the custom proof setup to be the default proof setup for documents, close all document windows before choosing the View > Proof Setup > Custom command.*

### Save or load a custom proof setup

1 Choose View > Proof Setup > Custom.

2 Do either of the following:

- To save a custom proof setup, click Save. To ensure that the new preset appears in the View > Proof Setup menu, save the preset in the default location.
- To load a custom proof setup, click Load.

# Color-managing documents when printing

## Printing with color management

Color management options for printing let you specify how you want Adobe applications to handle the outgoing image data so the printer will print colors consistent with what you see on your monitor. Your options for printing color-managed documents depend on the Adobe application you use, as well as the output device you select. In general, you have the following choices for handling colors during printing:

- Let the printer determine colors.
- Let the application determine colors.
- (Photoshop and InDesign) Do not use color management. In this workflow, no color conversion occurs. You may also need to turn off color management in your printer driver. This method is useful primarily for printing test targets or generating custom profiles.

## Letting the printer determine colors when printing

In this workflow, the application does no color conversion, but sends all necessary conversion information to the output device. This method is especially convenient when printing to inkjet photo printers, because each combination of paper type, printing resolution, and additional printing parameters (such as high-speed printing) requires a different profile. Most new inkjet photo printers come with fairly accurate profiles built into the driver, so letting the printer select the right profile saves time and alleviates mistakes. This method is also recommended if you are not familiar with color management.

If you choose this method, it is very important that you set up printing options and turn on color management in your printer driver. Search Help for additional instructions.

If you select a PostScript printer, you can take advantage of *PostScript color management*. PostScript color management makes it possible to perform color composite output or color separations at the raster image processor (RIP)—a process called *in-RIP separations*—so that a program need only specify parameters for separation and let the device calculate the final color values. PostScript color-managed output workflows require an output device that supports PostScript color management using PostScript Level 2 version 2017 or later, or PostScript Lanuage Level 3.

## Letting the application determine colors when printing

In this workflow, the application does all the color conversion, generating color data specific to one output device. The application uses the assigned color profiles to convert colors to the output device's gamut, and sends the resulting values to the output device. The accuracy of this method depends on the accuracy of the printer profile you select. Use this workflow when you have custom ICC profiles for each specific printer, ink, and paper combination.

If you choose this option, it is very important that you disable color management in your printer driver. Letting the application and the printer driver simultaneously manage colors during printing results in unpredictable color. Search Help for additional instructions.

### Obtaining custom profiles for desktop printers

If the output profiles that come with your printer don't produce satisfactory results, you obtain custom profiles in the following ways:

- Purchase a profile for your type of printer and paper. This is usually the easiest and least expensive method.
- Purchase a profile for your specific printer and paper. This method involves printing a profiling target on your printer and paper, and providing that target to a company that will create a specific profile. This is more expensive than purchasing a standard profile, but can provide better results because it compensates for any manufacturing variations in printers.
- Create your own profile using a scanner-based system. This method involves using profile-creation software and your own flatbed scanner to scan the profiling target. It can provide excellent results for matte surface papers, but not glossy papers. (Glossy papers tend to have fluorescent brighteners in them that look different to a scanner than they do in room light.)
- Create your own profile using a hardware profile-creation tool. This method is expensive but can provide the best results. A good hardware tool can create an accurate profile even with glossy papers.
- Tweak a profile created using one of the previous methods with profile-editing software. This software can be complex to use, but it lets you correct problems with a profile or simply adjust a profile to produce results more to your taste.

#### See also

"Install a color profile" on page 318

# Working with color profiles

## About color profiles

Precise, consistent color management requires accurate ICC-compliant profiles of all of your color devices. For example, without an accurate scanner profile, a perfectly scanned image may appear incorrect in another program, simply due to any difference between the scanner and the program displaying the image. This misleading representation may cause you to make unnecessary, time-wasting, and potentially damaging "corrections" to an already satisfactory image. With an accurate profile, a program importing the image can correct for any device differences and display a scan's actual colors.

A color management system uses the following kinds of profiles:

**Monitor profiles** Describe how the monitor is currently reproducing color. This is the first profile you should create because viewing color accurately on your monitor allows for critical color decisions in the design process. If what you see on your monitor is not representative of the actual colors in your document, you will not be able to maintain color consistency.

**Input device profiles** Describe what colors an input device is capable of capturing or scanning. If your digital camera offers a choice of profiles, Adobe recommends that you select Adobe RGB. Otherwise, use sRGB (which is the default

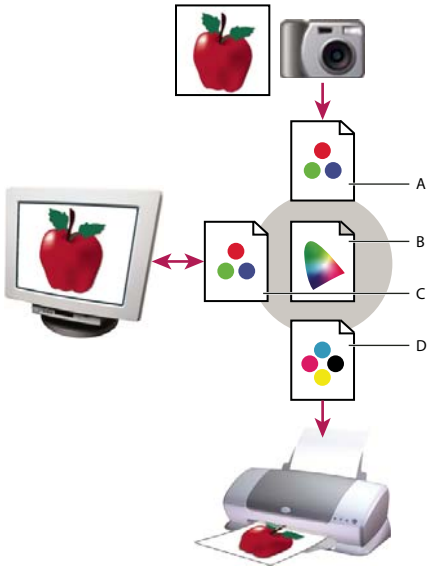
for most cameras). Advanced users may also consider using different profiles for different light sources. For scanner profiles, some photographers create separate profiles for each type or brand of film scanned on a scanner.

**Output device profiles** Describe the color space of output devices like desktop printers or a printing press. The color management system uses output device profiles to properly map the colors in a document to the colors within the gamut of an output device's color space. The output profile should also take into consideration specific printing conditions, such as the type of paper and ink. For example, glossy paper is capable of displaying a different range of colors than matte paper.

Most printer drivers come with built-in color profiles. It's a good idea to try these profiles before you invest in custom profiles.

**Document profiles** Define the specific RGB or CMYK color space of a document. By assigning, or *tagging*, a document with a profile, the application provides a definition of actual color appearances in the document. For example, R=127, G=12, B=107 is just a set of numbers that different devices will display differently. But when tagged with the Adobe RGB color space, these numbers specify an actual color or wavelength of light–in this case, a specific color of purple.

When color management is on, Adobe applications automatically assign new documents a profile based on Working Space options in the Color Settings dialog box. Documents without assigned profiles are known as *untagged* and contain only raw color numbers. When working with untagged documents, Adobe applications use the current working space profile to display and edit colors.




*Managing color with profiles*
***A.*** *Profiles describe the color spaces of the input device and the document.* ***B.*** *Using the profiles' descriptions, the color management system identifies the document's actual colors.* ***C.*** *The monitor's profile tells the color management system how to translate the document's numeric values to the monitor's color space.* ***D.*** *Using the output device's profile, the color management system translates the document's numeric values to the color values of the output device so the correct appearance of colors is printed.*

## See also

"Calibrate and profile your monitor" on page 317

"Letting the printer determine colors when printing" on page 314

"Obtaining custom profiles for desktop printers" on page 315

"About color working spaces" on page 320

## About monitor calibration and characterization

Profiling software can both calibrate and characterize your monitor. *Calibrating* your monitor brings it into compliance with a predefined standard—for example, adjusting your monitor so that it displays color using the graphics arts standard white point color temperature of 5000° K (Kelvin). *Characterizing* your monitor simply creates a profile that describes how the monitor is currently reproducing color.

Monitor calibration involves adjusting the following video settings:

**Brightness and contrast** The overall level and range, respectively, of display intensity. These parameters work just as they do on a television. A monitor calibration utility helps you set an optimum brightness and contrast range for calibration.

**Gamma** The brightness of the midtone values. The values produced by a monitor from black to white are nonlinear—if you graph the values, they form a curve, not a straight line. Gamma defines the value of that curve halfway between black and white.

**Phosphors** The substances that CRT monitors use to emit light. Different phosphors have different color characteristics.

**White point** The color and intensity of the brightest white the monitor can reproduce.

## Calibrate and profile your monitor

When you calibrate your monitor, you are adjusting it so it conforms to a known specification. Once your monitor is calibrated, the profiling utility lets you save a color profile. The profile describes the color behavior of the monitor—what colors can or cannot be displayed on the monitor and how the numeric color values in an image must be converted so that colors are displayed accurately.

**1** Make sure your monitor has been turned on for at least a half hour. This gives it sufficient time to warm up and produce more consistent output.

**2** Make sure your monitor is displaying thousands of colors or more. Ideally, make sure it is displaying millions of colors or 24-bit or higher.

**3** Remove colorful background patterns on your monitor desktop and set your desktop to display neutral grays. Busy patterns or bright colors surrounding a document interfere with accurate color perception.

**4** Do one of the following to calibrate and profile your monitor:

- In Windows, install and use a monitor calibration utility.
- In Mac OS, use the Calibrate utility, located on the System Preferences/Displays/Color tab.
- For the best results, use third-party software and measuring devices. In general, using a measuring device such as a colorimeter along with software can create more accurate profiles because an instrument can measure the colors displayed on a monitor far more accurately than the human eye.

***Note:*** *Monitor performance changes and declines over time; recalibrate and profile your monitor every month or so. If you find it difficult or impossible to calibrate your monitor to a standard, it may be too old and faded.*

Most profiling software automatically assigns the new profile as the default monitor profile. For instructions on how to manually assign the monitor profile, refer to the Help system for your operating system.

## Install a color profile

Color profiles are often installed when a device is added to your system. The accuracy of these profiles (often called *generic profiles* or *canned profiles*) varies from manufacturer to manufacturer. You can also obtain device profiles from your service provider, download profiles from the web, or create *custom profiles* using professional profiling equipment.

- In Windows, right-click a profile and select Install Profile. Alternatively, copy the profiles into the WINDOWS\system32\spool\drivers\color folder.
- In Mac OS, copy profiles into the /Library/ColorSync/Profiles folder or the /Users/[*username*]/Library/ColorSync/Profiles folder.

After installing color profiles, be sure to restart Adobe applications.

### See also

"Obtaining custom profiles for desktop printers" on page 315

## Embed a color profile

To embed a color profile in a document you created in Illustrator, InDesign, or Photoshop, you must save or export the document in a format that supports ICC profiles.

**1** Save or export the document in one of the following file formats: Adobe PDF, PSD (Photoshop), AI (Illustrator), INDD (InDesign), JPEG, Photoshop EPS, Large Document Format, or TIFF.

**2** Select the option for embedding ICC profiles. The exact name and location of this option varies between applications. Search Adobe Help for additional instructions.

## Embed a color profile (Acrobat)

You can embed a color profile in an object or an entire PDF. Acrobat attaches the appropriate profile, as specified in the Destination Space area of the Convert Colors dialog box, to the selected color space in the PDF. For more information, see the color conversion topics in Complete Acrobat Help.

## Changing the color profile for a document

There are very few situations that require you to change the color profile for a document. This is because your application automatically assigns the color profile based on the settings you select in the Color Settings dialog box. The only times you should manually change a color profile are when preparing a document for a different output destination or correcting a policy behavior that you no longer want implemented in the document. Changing the profile is recommended for advanced users only.

You can change the color profile for a document in the following ways:

- Assign a new profile. The color numbers in the document remain the same, but the new profile may dramatically change the appearance of the colors as displayed on your monitor.
- Remove the profile so that the document is no longer color-managed.
- (Acrobat, Photoshop and InDesign) Convert the colors in the document to the color space of a different profile. The color numbers are shifted in an effort to preserve the original color appearances.

## Assign or remove a color profile (Illustrator, Photoshop)

**1** Choose Edit > Assign Profile.

**2** Select an option, and click OK:

**Don't Color Manage This Document** Removes the existing profile from the document. Select this option only if you are sure that you do not want to color-manage the document. After you remove the profile from a document, the appearance of colors is defined by the application's working space profiles.

**Working [color model: working space]** Assigns the working space profile to the document.

**Profile** Lets you select a different profile. The application assigns the new profile to the document without converting colors to the profile space. This may dramatically change the appearance of the colors as displayed on your monitor.

### See also

"Changing the color profile for a document" on page 318

## Assign or remove a color profile (InDesign)

**1** Choose Edit > Assign Profiles.

**2** For RGB Profile and CMYK Profile, select one of the following:

**Discard (Use Current Working Space)** Removes the existing profile from the document. Select this option only if you are sure that you do not want to color-manage the document. After you remove the profile from a document, the appearance of colors is defined by the application's working space profiles, and you can no longer embed a profile in the document.

**Assign Current Working Space [working space]** Assigns the working space profile to the document.

**Assign Profile** Lets you select a different profile. The application assigns the new profile to the document without converting colors to the profile space. This may dramatically change the appearance of the colors as displayed on your monitor.

**3** Choose a rendering intent for each type of graphic in your document. For each graphic type, you can choose one of the four standard intents, or the Use Color Settings Intent, which uses the rendering intent currently specified in the Color Settings dialog box. For more information on rendering intents, search in Help.

The graphic types include the following:

**Solid Color Intent** Sets the rendering intent for all vector art (solid areas of color) in InDesign native objects.

**Default Image Intent** Sets the default rendering intent for bitmap images placed in InDesign. You can still override this setting on an image-by-image basis.

**After-Blending Intent** Sets the rendering intent to the proofing or final color space for colors that result from transparency interactions on the page. Use this option when your document includes transparent objects.

**4** To preview the effects of the new profile assignment in the document, select Preview, and then click OK.

### See also

"Changing the color profile for a document" on page 318

"View or change profiles for imported bitmap images (InDesign)" on page 311

### Convert document colors to another profile (Photoshop)

**1** Choose Edit > Convert To Profile.

**2** Under Destination Space, choose the color profile to which you want to convert the document's colors. The document will be converted to and tagged with this new profile.

**3** Under Conversion Options, specify a color management engine, a rendering intent, and black point and dither options (if available). (See "Color conversion options" on page 323.)

**4** To flatten all layers of the document onto a single layer upon conversion, select Flatten Image.

**5** To preview the effects of the conversion in the document, select Preview.

### See also

"Changing the color profile for a document" on page 318

# Color settings

## Customize color settings

For most color-managed workflows, it is best to use a preset color setting that has been tested by Adobe Systems. Changing specific options is recommended only if you are knowledgeable about color management and very confident about the changes you make.

After you customize options, you can save them as a preset. Saving color settings ensures that you can reuse them and share them with other users or applications.

- To save color settings as a preset, click Save in the Color Settings dialog box. To ensure that the application displays the setting name in the Color Settings dialog box, save the file in the default location. If you save the file to a different location, you must load the file before you can select the setting.
- To load a color settings preset that's not saved in the standard location, click Load in the Color Settings dialog box, select the file you want to load, and click Open.

***Note:*** *In Acrobat, you cannot save customized color settings. To share customized color settings with Acrobat, you must create the file in InDesign, Illustrator, or Photoshop, and then save it in the default Settings folder. It will then be available in the Color Management category of the Preferences dialog box. You can also add settings manually to the default Settings folder.*

## About color working spaces

A *working space* is an intermediate color space used to define and edit color in Adobe applications. Each color model has a working space profile associated with it. You can choose working space profiles in the Color Settings dialog box.

A working space profile acts as the source profile for newly created documents that use the associated color model. For example, if Adobe RGB (1998) is the current RGB working space profile, each new RGB document that you create will use colors within the Adobe RGB (1998) gamut. Working spaces also determine the appearance of colors in untagged documents.

If you open a document embedded with a color profile that doesn't match the working space profile, the application uses a *color management policy* to determine how to handle the color data. In most cases, the default policy is to preserve the embedded profile.

### See also

"About missing and mismatched color profiles" on page 321

"Color management policy options" on page 322

## Working space options

To display working space options in Photoshop, Illustrator and InDesign, choose Edit > Color Settings. In Acrobat, select the Color Management category of the Preferences dialog box.



*To view a description of any profile, select the profile and then position the pointer over the profile name. The description appears at the bottom of the dialog box.*

**RGB** Determines the RGB color space of the application. In general, it's best to choose Adobe RGB or sRGB, rather than the profile for a specific device (such as a monitor profile).

sRGB is recommended when you prepare images for the web, because it defines the color space of the standard monitor used to view images on the web. sRGB is also a good choice when you work with images from consumer-level digital cameras, because most of these cameras use sRGB as their default color space.

Adobe RGB is recommended when you prepare documents for print, because Adobe RGB's gamut includes some printable colors (cyans and blues in particular) that can't be defined using sRGB. Adobe RGB is also a good choice when working with images from professional-level digital cameras, because most of these cameras use Adobe RGB as their default color space.

**CMYK** Determines the CMYK color space of the application. All CMYK working spaces are device-dependent, meaning that they are based on actual ink and paper combinations. The CMYK working spaces Adobe supplies are based on standard commercial print conditions.

**Gray (Photoshop) or Grayscale (Acrobat)** Determines the grayscale color space of the application.

**Spot (Photoshop)** Specifies the dot gain to use when displaying spot color channels and duotones.

***Note:*** *In Acrobat, you can use the color space in an embedded output intent instead of a document color space for viewing and printing. Select Output Intent Overrides Working Spaces. For more information on output intents, see Complete Acrobat Help.*

Adobe applications ship with a standard set of working space profiles that have been recommended and tested by Adobe Systems for most color management workflows. By default, only these profiles appear in the working space menus. To display additional color profiles that you have installed on your system, select Advanced Mode (Illustrator and InDesign) or More Options (Photoshop). A color profile must be bi-directional (that is, contain specifications for translating both into and out of color spaces) in order to appear in the working space menus.

***Note:*** *In Photoshop, you can create custom working space profiles. However, Adobe recommends that you use a standard working space profile rather than create a custom profile. For more information, see the Photoshop support knowledgebase at www.adobe.com/support/products/photoshop.html.*

## About missing and mismatched color profiles

For a newly created document, the color workflow usually operates seamlessly: Unless specified otherwise, the document uses the working space profile associated with its color mode for creating and editing colors.

However, some existing documents may not use the working space profile that you have specified, and some existing documents may not be color-managed. It is common to encounter the following exceptions to your color-managed workflow:

- You might open a document or import color data (for example, by copying and pasting or dragging and dropping) from a document that is not tagged with a profile. This is often the case when you open a document created in an application that either does not support color management or has color management turned off.
- You might open a document or import color data from a document that is tagged with a profile different from the current working space. This may be the case when you open a document that was created using different color management settings, or scanned and tagged with a scanner profile.

In either case, the application uses a color management policy to decide how to handle the color data in the document.

If the profile is missing or does not match the working space, the application may display a warning message, depending on options you set in the Color Settings dialog box. Profile warnings are turned off by default, but you can turn them on to ensure the appropriate color management of documents on a case-by-case basis. The warning messages vary between applications, but in general you have the following options:

- (Recommended) Leave the document or imported color data as it is. For example, you can choose to use the embedded profile (if one exists), leave the document without a color profile (if one doesn't exist), or preserve the numbers in pasted color data.
- Adjust the document or imported color data. For example, when opening a document with a missing color profile, you can choose to assign the current working space profile or a different profile. When opening a document with a mismatched color profile, you can choose to discard the profile or convert the colors to the current working space. When importing color data, you can choose to convert the colors to the current working space in order to preserve their appearance.

## Color management policy options

A *color management policy* determines how the application handles color data when you open a document or import an image. You can choose different policies for RGB and CMYK images, and you can specify when you want warning messages to appear. To display color management policy options, choose Edit > Color Settings.

*To view a description of a policy, select the policy and then position the pointer over the policy name. The description appears at the bottom of the dialog box.*

**RGB, CMYK, And Gray** Specifies a policy to follow when bringing colors into the current working space (either by opening files or importing images into the current document). (The Grayscale option is available for Photoshop only.) Choose from the following options:

- **Preserve Embedded Profiles** Always preserves embedded color profiles when opening files. This is the recommended option for most workflows because it provides consistent color management. One exception is if you're concerned about preserving CMYK numbers, in which case you should select Preserve Numbers (Ignore Linked Profiles) instead.

- **Convert To Working Space** Converts colors to the current working space profile when opening files and importing images. Select this option if you want to force all colors to use a single profile (the current working space profile).

- **Preserve Numbers (Ignore Linked Profiles)** This option is available in InDesign and Illustrator for CMYK. Preserves color numbers when opening files and importing images, but still allows you to use color management to

view colors accurately in Adobe applications. Select this option if you want to use a safe CMYK workflow. In InDesign, you can override this policy on a per-object basis by choosing Object > Image Color Settings.

• **Off** Ignores embedded color profiles when opening files and importing images, and does not assign the working space profile to new documents. Select this option if you want to discard any color metadata provided by the original document creator.

**Profile Mismatches: Ask When Opening** Displays a message whenever you open a document tagged with a profile other than the current working space. You will be given the option to override the policy's default behavior. Select this option if you want to ensure the appropriate color management of documents on a case-by-case basis.

**Profile Mismatches: Ask When Pasting** Displays a message whenever color profile mismatches occur as colors are imported into a document through pasting or dragging-and-dropping. You will be given the option to override the policy's default behavior. Select this option if you want to ensure the appropriate color management of pasted colors on a case-by-case basis.

**Missing Profiles: Ask When Opening** Displays a message whenever you open an untagged document. You will be given the option to override the policy's default behavior. Select this option if you want to ensure the appropriate color management of documents on a case-by-case basis.

## Color conversion options

Color conversion options let you control how the application handles the colors in a document as it moves from one color space to another. Changing these options is recommended only if you are knowledgeable about color management and very confident about the changes you make. To display conversion options, choose Edit > Color Settings, and select Advanced Mode (Illustrator and InDesign) or More Options (Photoshop). In Acrobat, select the Color Management category of the Preferences dialog box.

**Engine** Specifies the Color Management Module (CMM) used to map the gamut of one color space to the gamut of another. For most users, the default Adobe (ACE) engine fulfills all conversion needs.



*To view a description of an engine or intent option, select the option and then position the pointer over the option name. The description appears at the bottom of the dialog box.*

**Intent (Photoshop, Illustrator, InDesign)** Specifies the rendering intent used to translate one color space to another. Differences between rendering intents are apparent only when you print a document or convert it to a different working space.

**Use Black Point Compensation** Ensures that the shadow detail in the image is preserved by simulating the full dynamic range of the output device. Select this option if you plan to use black point compensation when printing (which is recommended in most situations).

**Use Dither (Photoshop)** Controls whether to dither colors when converting 8-bit-per-channel images between color spaces. When the Use Dither option is selected, Photoshop mixes colors in the destination color space to simulate a missing color that existed in the source space. Although dithering helps to reduce the blocky or banded appearance of an image, it may also result in larger file sizes when images are compressed for web use.

## About rendering intents

A *rendering intent* determines how a color management system handles color conversion from one color space to another. Different rendering intents use different rules to determine how the source colors are adjusted; for example, colors that fall inside the destination gamut may remain unchanged, or they may be adjusted to preserve the original range of visual relationships when translated to a smaller destination gamut. The result of choosing a rendering intent depends on the graphical content of documents and on the profiles used to specify color spaces. Some profiles produce identical results for different rendering intents.



*In general, it is best to use the default rendering intent for the selected color setting, which has been tested by Adobe Systems to meet industry standards. For example, if you choose a color setting for North America or Europe, the default rendering intent is Relative Colorimetric. If you choose a color setting for Japan, the default rendering intent is Perceptual.*

You can select a rendering intent when you set color conversion options for the color management system, soft-proof colors, and print artwork:

**Perceptual** Aims to preserve the visual relationship between colors so it's perceived as natural to the human eye, even though the color values themselves may change. This intent is suitable for photographic images with lots of out-of-gamut colors. This is the standard rendering intent for the Japanese printing industry.

**Saturation** Tries to produce vivid colors in an image at the expense of color accuracy. This rendering intent is suitable for business graphics like graphs or charts, where bright saturated colors are more important than the exact relationship between colors.

**Relative Colorimetric** Compares the extreme highlight of the source color space to that of the destination color space and shifts all colors accordingly. Out-of-gamut colors are shifted to the closest reproducible color in the destination color space. Relative Colorimetric preserves more of the original colors in an image than Perceptual. This is the standard rendering intent for printing in North America and Europe.

**Absolute Colorimetric** Leaves colors that fall inside the destination gamut unchanged. Out-of-gamut colors are clipped. No scaling of colors to destination white point is performed. This intent aims to maintain color accuracy at the expense of preserving relationships between colors and is suitable for proofing to simulate the output of a particular device. This intent is particularly useful for previewing how paper color affects printed colors.

## Advanced controls in Photoshop

In Photoshop you display advanced controls for managing color by choosing Edit > Color Settings and selecting More Options.

**Desaturate Monitor Colors By** Determines whether to desaturate colors by the specified amount when displayed on the monitor. When selected, this option can aid in visualizing the full range of color spaces with gamuts larger than that of the monitor. However, this causes a mismatch between the monitor display and the output. When the option is deselected, distinct colors in the image may display as a single color.

**Blend RGB Colors Using Gamma** Controls how RGB colors blend together to produce composite data (for example, when you blend or paint layers using Normal mode). When the option is selected, RGB colors are blended in the color space corresponding to the specified gamma. A gamma of 1.00 is considered "colorimetrically correct" and should result in the fewest edge artifacts. When the option is deselected, RGB colors are blended directly in the document's color space.

***Note:*** *When you select Blend RGB Colors Using Gamma, layered documents will look different when displayed in other applications than they do in Photoshop.*

# Chapter 15: Printing

Whether you send a quick draft to an inkjet or laser printer, provide a multicolored document to an outside service provider, or print a complex technical document with custom page sizes, you can set options in the Print dialog box to ensure that the finished document appears as intended.

## Basic printing tasks

### Print a PDF

If the desired printing option is in the Print dialog box, set it there rather than through the printer driver.

**1** Make sure that you've installed the correct printer driver and PPD file for your printer. Printing results are generally more predictable with the correct PPD.

**2** Choose File > Print Setup (Windows) or File > Page Setup (Mac OS) to choose a paper size, page orientation, and other general printing options. The options vary with different printers and drivers. See your printer driver documentation for details.

**3** To print comments, such as sticky notes, in the Preferences dialog box, choose Commenting and select Print Notes And Pop-ups.

***Note:*** *To open Preferences in Windows, choose Edit > Preferences. In Mac OS, choose Acrobat > Preferences.*

**4** Click the Print button , or choose File > Print.

**5** Choose a printer from the menu at the top of the Print dialog box.

**6** (Mac OS) Choose an option from the Presets pop-up menu.

**7** In Windows, click Properties to set any additional options available with the printer driver. In Mac OS, set printer driver options in the Print Center.

**8** To print comments or forms, select an option from the Comments And Forms pop-up menu.

**9** Indicate which pages you want to print, and then click OK.

### Print over the Internet

You can print open PDFs to a FedEx Kinkos office in the United States.

***Note:*** *This feature is only available in the United States.*

**1** Save the document, and then choose File > Send To FedEx Kinkos.

**2** Click OK to upload the document to the FedEx Kinkos print services website. You will then be guided through placing your print order.

### Options in the Print dialog box

Most of the options in the Acrobat Print dialog box are the same for other applications.

**Comments And Forms** Specifies which visible content prints.

- **Document** Prints the document contents and form fields.

• **Document And Markups** Prints document contents, form fields, and comments.

• **Document And Stamps** Prints the document, form fields, and stamps, but no other markups, such as note comments and pencil lines.

• **Form Fields Only** Prints interactive form fields but doesn't print document contents.

**Current View/Selected Graphic** Prints the page area (including text, comments, and so on) that is visible in the current view. The option name changes depending on whether you have no pages selected (Current View), a page or pages selected (Selected Pages), or an area on a page selected using the Snapshot tool (Selected Graphic).

**Current Page** Prints the page that is visible in the current view.

**Pages** Specifies the range of pages to print in the open PDF. Separate numbers in a range by using a hyphen, and separate multiple pages or ranges by using commas or spaces. If the Use Logical Page Numbers option is selected in Page Display Preferences, you can enter numbers that match the numbering printed on the pages using roman numerals or actual page numbers. For example, if the first page of a document is numbered iii, you can enter iii or 1 to print that page. Selecting Odd Pages Only or Even Pages Only affects which pages in a range print. For example, in a range that includes 2, 7–10 with Even Pages Only selected, only pages 2, 8, and 10 will print.



*To print from a specific page to the end of the document, enter the page with a hyphen. For example, "11-" prints page 11 to the last page of the document.*

**Subset** Choose All Pages In Range, or choose Odd Pages Only or Even Pages Only to print only those pages within the specified range.

**Reverse Pages** Prints pages in reverse order. If page ranges are entered, the pages print opposite of the order in which they were entered. For example, if the Pages box shows 3–5, 7–10, selecting Reverse Pages prints pages 10–7, and then 5–3.

**Page Scaling** Reduces, enlarges, or divides pages when printing.

• **None** Prints the upper left or center of a page (if auto-rotated and centered) without scaling. Pages or selections that don't fit on the paper are cropped.

• **Fit To Printable Area** Reduces or enlarges each page to fit the printable area of the currently selected paper size. For PostScript® printers, the PPD determines the printable area of the paper.

• **Shrink To Printable Area** Shrinks large pages to fit the currently selected paper size but doesn't enlarge small pages. If an area is selected and is larger than the printable area of the currently selected paper, it's scaled to fit the printable area.

• **Tile Large Pages** Applies tiling to pages that are larger than the selected paper size at the specified scale. These pages are mapped to multiple sheets of paper. If this option is selected, you can also specify settings for Tile Scale, Overlap, Cut Marks, and Labels.

• **Tile All Pages** Applies tiling to all pages, regardless of size. However, only the pages that are larger than the selected paper size at the specified scale are mapped to multiple sheets of paper. If this option is selected, you can also specify settings for Tile Scale, Overlap, Cut Marks, and Labels.

• **Multiple Pages Per Sheet** Enables N-up printing, where multiple pages print on the same sheet of paper. If this option is selected, you can also specify settings for Pages Per Sheet, Page Order, Print Page Border, and Auto-Rotate Pages.

***Note:*** *N-up printing in Acrobat is independent of the N-up printing features of printer drivers. The Acrobat print settings don't reflect the N-up settings of the printer drivers. Select N-up printing either in Acrobat or in the printer driver, but not both.*

• **Booklet Printing** Prints multiple pages on the same sheet of paper in the order required to read correctly when folded. The printer must support *duplex printing* (printing on both sides of the sheet). Acrobat automatically enables duplex printing, if available, for booklet printing.

**Pages Per Sheet** Prints a predefined number of pages, or a custom number (up to 99), horizontally and vertically during N-up printing. If you select a predefined number from the menu, Acrobatautomatically selects the best paper orientation.

**Page Order** Defines how the pages are ordered on paper during N-up printing. Horizontal places pages from left to right, top to bottom. Horizontal Reversed places pages from right to left, top to bottom. Vertical places pages top to bottom, left to right. Vertical Reversed places pages top to bottom, right to left. Both reversed options are suitable for Asian-language documents.

**Print Page Border** Draws the crop box (the page boundary of PDF pages) during N-up printing.

**Auto-Rotate Pages** Adjusts the PDF's orientation to match the orientation specified in the printer properties during N-up printing.

***Note:*** *The Shrink To Printable Area option is always active for N-up printing. Therefore, the pages are always shrunk to fit the available imaging area regardless of how the Auto-Rotate And Center option is set.*

**Choose Paper Source By PDF Page Size (Windows)** Uses the PDF page size to determine the output tray rather than the page setup option. This option is useful for printing PDFs that contain multiple page sizes on printers that have different-sized output trays.

**Print To File (Windows)** Creates a device-dependent PostScript file of the document. The resulting file contains code for enabling and controlling specific device features, making it less compatible with devices other than the target device. For better results when creating PostScript files, use the Save As PostScript command.

***Note:*** *You don't need to have a PostScript printer to create a PostScript file.*

**Printing Tips** If you're connected to the Internet, this option connects to the Adobe website for information on how to troubleshoot printing problems.

**Advanced** Opens one or more panels for setting additional printing options.

**Summarize Comments** Creates a separate, printable PDF of the comments in a document. This option is unavailable when you print from a web browser or print multiple documents in PDF packages. See "Print a comment summary" on page 173.

### See also

"Downloading Asian fonts to a printer" on page 335

"Create print presets" on page 328

## Print a portion of a page

**1** Choose Tools > Select & Zoom > Snapshot Tool.

**2** Drag around the area you want to print.

Acrobat copies the selected area to the clipboard.

**3** Choose File > Print to print the selection.

## Print layers

Normally, when you print a PDF that contains layers, just the content that is visible on-screen is printed. However, the creator of a layered PDF can specify that some layered content, such as watermarks or confidential information, must (or must not) print, regardless of its visibility on-screen. If the document is designed to print differently from how it currently appears on-screen, a message may appear in the Print dialog box. The Preview image in the Print dialog box always shows the page as it will print.

***Note:*** *To work with layers in Acrobat, convert the source document to PDF using a preset that preserves layers, such as Acrobat 6 (PDF 1.5) or later.*

### View how layers print

**1** Click the Layers icon in the navigation panel.

**2** Choose Apply Print Overrides from the Options menu.

***Note:*** *Depending on the visibility settings specified when the PDF was created, Apply Print Overrides may be unavailable in the Options menu.*

### Change print settings for a layer

**1** Click the Layers icon in the navigation panel.

**2** Expand the layers area, select a layer, and then select Layer Properties from the Options menu.

**3** In the Layer Properties dialog box, choose one of the following from the Print pop-up menu:

**Always Prints** Forces the layer to print.

**Never Prints** Forces the layer not to print.

**Prints When Visible** Matches printed output to on-screen visibility.

## Create print presets

A PDF can contain a set of *print presets*, a group of document-specific values that is used to set basic print options. By creating a print preset for a document, you can avoid manually setting certain options in the Print dialog box each time you print the document. It's best to define print settings for a PDF at the time that you create it, but print presets provide a means to add basic print settings to a PDF at any time.

**1** Choose File > Properties, and click the Advanced tab.

**2** In the Print Dialog Presets section, set options and click OK.

The next time you open the Print dialog box, the values will be set to the print preset values. These settings are also used when you print individual documents in a PDF package.

***Note:*** *To retain a print preset for a PDF, you must save the PDF after creating the print preset.*

### Print Dialog Presets

**Page Scaling** Prepopulates the Page Scaling option in the Print dialog box with the option you choose:

- **Default** Uses the application default setting, which is Shrink To Printable Area.
- **None** Prevents automatic scaling to fit the printable area. This setting is useful for preserving the scale of page content in engineering documents, or for ensuring that documents print at a particular point size to be legal.

**DuplexMode** For best results, the selected printer should support duplex printing if you select a duplex option.

- **Simplex** Prints on one side of the paper.

- **Duplex Flip Long Edge** Prints on both sides of the paper; the paper flips along the long edge.
- **Duplex Flip Short Edge** Prints on both sides of the paper; the paper flips along the short edge.

**Paper Source By Page Size** Selects the option by the same name in the Print dialog box. Uses the PDF page size to determine the output tray rather than the page setup option. This option is useful for printing PDFs that contain multiple page sizes on printers that have different-sized output trays.

**Print Page Range** Prepopulates the Pages box in the Print Range section of the Print dialog box with the page ranges you enter here. This setting is useful in a workflow where documents include both instruction pages and legal pages. For example, if pages 1–2 represent instructions for filling out a form, and pages 3–5 represent the form, you can set up your print job to print multiple copies of only the form.

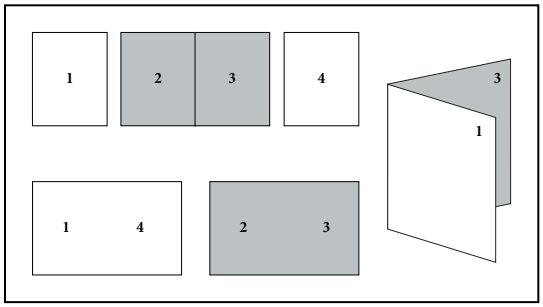
**Number Of Copies** Prepopulates the Copies box in the Print dialog box. Choose a number from 2 to 5, or choose Default to use the application default, which is one copy. This limitation prevents multiple unwanted copies from being printed.

# Other ways to print PDFs

## About booklets

*Booklets* are documents with multiple pages arranged on sheets of paper that, when folded, present the correct page order. You can create 2-up saddle-stitched booklets, where two side-by-side-pages, printed on both sides, are folded once and fastened along the fold. The first page prints on the same printed sheet as the last page, the second page on the same sheet as the second-to-last page, and so on. Each page is automatically centered on the sheet, and large pages are scaled (shrunk) to fit the printable area. When you collate, fold, and staple the double-sided pages, the result is a single book with correct pagination.

To print booklets, your printer must support either automatic or manual *duplex printing* (printing on both sides of the paper). Manual duplex printing requires two separate printing passes: one to print the front side, and another to print the back side. To find out whether your printer supports duplex printing, check the printer manual, contact the printer manufacturer, or click the Properties button in the Print dialog box and look for options that mention two-sided or duplex printing.




*Pages arranged in PDF (top), pages arranged in booklet layout (bottom), and pages printed and folded into new booklet*

## Print a booklet

**1** Choose File > Print and select the printer.

**2** Choose Booklet Printing from the Page Scaling menu.

**3** In the Print Range area, specify which pages to print:

- To print pages from front to back, select All.
- To divide a large booklet into smaller groupings, select Pages and specify a page range for the first grouping. Print each page range separately.
- To print certain pages on a different paper or paper stock, specify those pages using the Sheets From/To option. Click the Properties button and select the correct paper tray and any other options as necessary.

**4** Choose additional page handling options. The Preview image changes as you specify options.

**Booklet Subset** Determines which sides of the paper print. Choose Both Sides to automatically print both sides of the paper (your printer must support automatic duplex printing). Choose Front Side Only to print all pages that appear on the front side of the paper. After these pages print, flip them, choose File > Print again, and choose Back Side Only. Depending on the printer model, you might have to turn and reorder the pages to print the back sides.

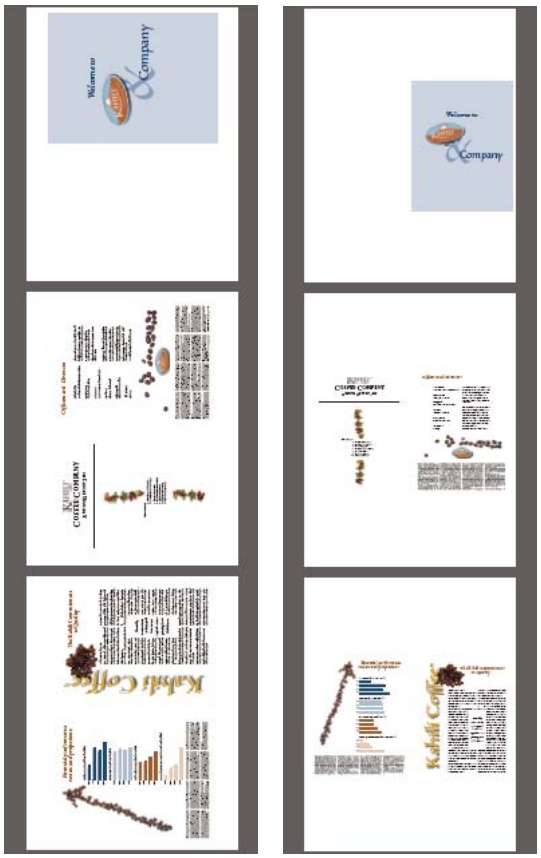


*To prevent others in a shared printing environment from printing on your pages before you print the back side, consider printing the back side pages using a different paper tray.*

**Auto-Rotate Pages** Automatically rotates each page for the best fit in the printable area.

**Sheets From** Specifies the first and last sheet to print. Acrobat determines which sheets must print to accommodate the print job. For example, if you have a 16-page document, then sheets 1 through 4 print.

**Binding** Determines the orientation for the binding. Choose Left for text read left-to-right; choose Left (Tall) for paper folded on the long side, where the printable area is long and narrow. Choose Right for text read right-to-left or for Asian-style vertical reading; choose Right (Tall) for paper folded on the long side.



*Compare Right binding with Right (Tall).*

## Print documents in a PDF package

A PDF package contains multiple documents wrapped in one PDF. You can print the documents individually or together.

**1** Open the PDF package. You can select the cover sheet and print it on a different printer or paper stock.

**2** Choose File > Print, and then choose one of the following commands:

**Print Current Document** Prints the open PDF.

**Print All Documents** Prints all the PDFs in the package.

**Print Selected Documents** Prints some of the PDFs in the package. (This option is available only when multiple files are selected in the list of component documents.)

**3** Choose applicable printing options, and click OK.

Documents are printed in the order they appear in the package.

***Note:*** *You must use the native application to print any component file that is not a PDF. When a non-PDF component is selected in the PDF package component list, you can click the Open button that appears in the Acrobat document pane to open the file's native application, if it is installed on your computer.*

### See also

"About PDF packages" on page 112

## Print from the Bookmarks tab

You can print the pages associated with bookmarks directly from the Bookmarks tab. Bookmarks appear in a hierarchy, with parent bookmarks and child (dependent) bookmarks. If you print a parent bookmark, all page content associated with child-level bookmarks also print.

Not all bookmarks display page content, and therefore cannot be printed. For example, some bookmarks open a file or play a sound. If you select a mix of printable and nonprintable bookmarks, the nonprintable bookmarks are ignored.

***Note:*** *Bookmarks made from tagged content always display page content because the tagged content represents printable elements in the document structure, such as headings and figures.*

**1** Open a PDF with bookmarks. If necessary, choose View > Navigation Panels > Bookmarks so the bookmarks appear in the navigation pane.

**2** Select one or more bookmarks, and then right-click/Control-click the selection.

**3** Choose Print Page(s) from the menu.

### See also

"About bookmarks" on page 251

"Add tagged bookmarks" on page 254

# Printing custom sizes

## Print an oversized document

Although you can create a PDF file as large as 15,000,000 inches (38,100,000 cm) in either direction, most desktop printers cannot print such large pages. To print an oversized document on your desktop printer, you can print each page in pieces, called tiles, and then trim and assemble those pieces.

You can also increase the scale of a standard-sized document and print it on multiple pages.

**1** Choose File > Print.

**2** From the Page Scaling menu, choose Tile All Pages if all pages of the document are oversized. If some of the pages are standard-sized, choose Tile Large Pages.

**3** (Optional) Set any of these options, referring to the Preview image to check the output results:

**Tile Scale** Adjusts the scaling. The scaling affects how the sections of the PDF page map to the physical sheet.

**Overlap** Specifies the minimum amount of duplicated information you want printed on each tile for ease in assembly. The Overlap option uses the unit of measure specified for the document. The value should be greater than the minimum nonprinting margins for the printer. You can specify up to half the size of the shortest side of the document page to overlap. For example, tiles for a page that measures 11-by-17 inches (279.4mm-by-431.8mm) can overlap up to 5.5 inches (139.7mm).

**Labels** Includes the PDF name, date of printing, and tile coordinate on every sheet. For example, Page 1 (1,1) means row 1, column 1 of the first page. Tile coordinates are used for reassembling the tiles.

**Cut Marks** Prints marks on each corner of a tiled page for ease of assembly. Use this option in conjunction with the Overlap option. When you specify an overlapping edge and then superimpose those edges, you can use the cut marks to line up the tiles.

### Scale a document for printing

To print an oversized PDF on paper that has smaller dimensions, you can scale the document's width and height to fit.

1 Choose File > Print.

2 From the Page Scaling menu, choose Fit To Printable Area or Shrink To Printable Area.

# Advanced print settings

### About PPD files

A *PPD file* (PostScript Printer Description file) customizes the behavior of the driver for your specific PostScript printer. It contains information about the output device, including printer-resident fonts, available media sizes and orientation, optimized screen frequencies, screen angles, resolution, and color output capabilities. It's important to set up the correct PPD before you print. Selecting the PPD that corresponds to your PostScript printer or imagesetter populates the Print dialog box with the available settings for the output device. You can switch to a different one to suit your needs. Applications use the information in the PPD file to determine which PostScript information to send to the printer when printing a document.

For best printing results, Adobe recommends that you obtain the latest version of the PPD file for your output device from the manufacturer. Many print service providers and commercial printers have PPDs for the imagesetters they use. Be sure to store PPDs in the location specified by the operating system. For details, consult the documentation for your operating system.

### Select a PPD file

The steps for selecting a PPD file are different for each platform.

#### Select a PPD file in Windows

1 Depending on your version of Windows, do one of the following to open the Add Printer wizard:

- In Windows 2000, choose Start > Settings > Printers > Add Printer.
- In Windows XP, choose Start, open the Printers And Faxes control panel, and click Add A Printer.

2 Follow the instructions to add a printer and specify a PPD file.

#### Select a PPD file in Mac OS

1 Open the area where you add printers.

2 Click Add in the Printer List window.

3 From the top menu, choose a connection method.

4 Select a printer, or enter the printer's IP address.

**5** From the bottom menu, select a printer model.

**6** In the list that appears, select a PPD file, and then click Add.

## About advanced print settings

If normal print settings don't produce the results you expect, you may need to specify options in the Advanced Print Setup dialog box. For example, if your printed output doesn't match the document's on-screen appearance, you may need to try printing the document as an image. Or, if a PDF uses fonts that aren't embedded, you must download the fonts to the printer when you print the document.

## Set advanced print options

The Advanced Print Setup dialog box is available for PostScript and non-PostScript printers.

**1** In the Print dialog box, click Advanced.



*To learn more about an option, select it. A description appears at the bottom of the dialog box.*

**2** Set options for PostScript printers, and then click OK.

***Note:*** *Acrobat sets the PostScript level automatically, based on the selected printer.*

### See also

"PostScript options" on page 334

## PostScript options

Use the PostScript Options panel of the Advanced Print Setup dialog box to set options for a particular PostScript printer, such as how to handle nonresident printer fonts and whether to download Asian fonts. In addition, if a PDF contains device-dependent settings, such as halftones and transfer functions, these settings can be sent in the PostScript output to override the default settings in the printer. To use these options, you must be connected to a PostScript printer or have a PostScript printer driver installed with a PPD file selected.

**Print Method** Specifies the level of PostScript to generate for the pages. Choose the level of PostScript appropriate for your printer.

**Font And Resource Policy** Specifies how fonts and resources in the document are sent to a printer when those fonts and resources aren't present on the printer.

- **Send At Start** Downloads all fonts and resources at the start of the print job. The fonts and resources remain on the printer until the job has finished printing. This option is the fastest but uses the most printer memory.

- **Send By Range** Downloads fonts and resources before printing the first page that uses them, and then discards them when they are no longer needed. This option uses less printer memory. However, if a PostScript processor reorders the pages later in the workflow, it might not reorder the font downloading correctly, resulting in missing fonts. This option may not work with some printers.

- **Send For Each Page** Downloads all fonts and resources for a given page before the page prints, and then discards the fonts when the page has finished printing. This option uses the least printer memory.

**Download Asian Fonts** Prints documents with Asian fonts that aren't installed on the printer or embedded in the PDF. The Asian fonts must be present on the system.

**Emit CIDFontType2 As CIDFontType2 (PS Version 2015 And Greater)** Preserves hinting information in the original font when printing. If unselected, CIDFontType2 fonts are converted to CIDFontType0 fonts, which are compatible with a wider range of printers. This option is available for PostScript 3 and PostScript Level 2 (PostScript version 2015 and later) output devices.

**Print As Image** Prints pages as bitmap images. Select this option if normal printing doesn't produce the desired results, and specify a resolution. This option is available only for PostScript printers.

## Downloading Asian fonts to a printer

Select the Download Asian Fonts option in the Advanced Print Setup dialog box if you want to print a PDF with Asian fonts that are not installed on the printer or embedded in the document. (Embedded fonts are downloaded whether or not this option is selected.) You can use this option with a PostScript Level 2 or higher printer. To make Asian fonts available for downloading to a printer, be sure you have downloaded the fonts to your computer using the Custom or Complete installation option during installation of Acrobat.

If Download Asian Fonts is not selected, the PDF prints correctly only if the referenced fonts are installed on the printer. If the printer has similar fonts, the printer substitutes those. If there are no suitable fonts on the printer, Courier is used for the text.

If Download Asian Fonts does not produce the results you want, print the PDF as a bitmap image. Printing a document as an image may take longer than using a substituted printer font.

***Note:*** *Some fonts cannot be downloaded to a printer, either because the font is a bitmap or because font embedding is restricted in that document. In these cases, a substitute font is used for printing, and the printed output may not match the screen display.*

# Chapter 16: Adobe Version Cue

## Using Adobe Version Cue

### About Version Cue

Adobe Version Cue® is a file-version manager included with Adobe Creative Suite that integrates versioning and asset management into your existing workflows within and across Adobe Creative Suite components, including Adobe Photoshop CS2, Adobe InDesign CS2, Adobe Illustrator CS2, Adobe GoLive CS2, Adobe Acrobat, and Adobe Bridge. Version Cue consists of two components: a server included with Adobe Creative Suite that you can install locally or on a centralized server, and a client that's automatically installed with Adobe Creative Suite components, Adobe InCopy, and Acrobat.

You can use Version Cue in a single Adobe Creative Suite component, such as Photoshop, or across multiple components, such as Photoshop and Illustrator, to track changes to a file as you work on it. Use Version Cue to enable efficient workgroup collaboration by way of file sharing, version control, and online reviews.

You can use Bridge to access Version Cue Servers, projects, and files, and to quickly view and compare information about Version Cue-managed assets. For more information about using Bridge with Version Cue, see Adobe Creative Suite Help.

If you use Adobe Creative Suite, or if you have access to a shared Version Cue project and have been granted appropriate privileges by the project's owner, you can use the Version Cue Workspace Administration utility to create and manage users and groups, projects, and PDF reviews. For more information, see "About the Version Cue Administration utility" on page 357

Version Cue streamlines the following tasks:

- Creating historical versions of your files.
- Maintaining file security.
- Organizing files into private or shared projects.
- Browsing with file thumbnails, and searching file information and version comments.
- Reviewing file information, comments, and file status in private and shared projects while you browse.

#### See also

"Availability of Version Cue features" on page 336

### Availability of Version Cue features

Different Version Cue features are available in different environments:

- If you use Acrobat 8 but not Adobe Creative Suite, you can gain access to the full Version Cue feature set by participating in a shared project; that is, you can gain access if another user on your network installs Adobe Creative Suite and gives you access to a Version Cue project in a Version Cue Workspace.
- If you use Adobe Creative Suite, you have access to the full set of Version Cue features, including Version Cue Administration.

### See also

"About the Adobe dialog box" on page 337

"Getting the most out of Version Cue" on page 337

## Getting the most out of Version Cue

In Version Cue, you create *projects* that you and other users can access through Adobe Creative Suite components, InCopy, and Acrobat 8. Projects keep related files together in one place. Version Cue manages the files in these projects. Because Version Cue works in all Adobe Creative Suite components, InCopy, and Acrobat 8, your design process isn't interrupted when you work on individual files within a project.

You can use Version Cue in a single application, such as Photoshop CS2, to track changes to a file as you work on it. In addition, workgroups or an individual can use Version Cue across applications. Multiple users can manage projects that contain files from all Adobe Creative Suite components and Acrobat 8. Projects can include non-Adobe files, such as text documents, billing forms, or spreadsheets. When you keep all managed files related to a project in one place, you eliminate the task of tracking down important files.

Here's an example of how you might use Version Cue with Adobe Creative Suite. You start by creating a new project and adding a Photoshop file containing the main image for a printed piece. Then, you add art from Illustrator and text from InDesign. Next, you add GoLive web elements to leverage your printed content for use in a web page. As you and your team work on each piece of the project, Version Cue creates *versions* to keep track of changes. When it's time to present the project, you create a PDF of each project file and use the Version Cue Administration utility to set up an online *PDF review*. Your customers, supervisors, or peer reviewers view and comment on the project using Acrobat.

### See also

"Create and edit projects" on page 341

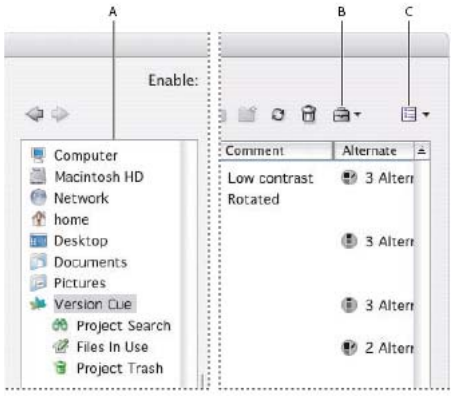
"Availability of Version Cue features" on page 336

## About the Adobe dialog box

In Adobe Creative Suite 2.0 components (except for GoLive and Acrobat 7), and in InCopy CS2, you can use the Adobe dialog box when you choose the Open, Import, Export, Place, Save, or Save As commands, even if you don't use Version Cue. In Acrobat 8, you can use the Adobe dialog box when you choose the Open, Save, or Save As commands, even if you don't use Version Cue.

The Adobe dialog box displays additional information, including thumbnails, which make it easy to identify files. You can use the Adobe dialog box when working with both Adobe and non-Adobe files.

By default, when you choose the Open, Save, or Save As commands, the Operating System (OS) dialog box appears. To use the Adobe dialog box instead and set it as the default, click Use Adobe Dialog. Use the View menu options to customize the display. You can change back to the OS dialog box at any time by clicking Use OS Dialog.




*Adobe dialog box*
***A.** Favorites panel **B.** Project Tools menu **C.** View menu*

You can use the Adobe dialog box to accomplish these tasks:

- Add frequently used files and folders to the Favorites panel for quick access.
- View thumbnail images of files.
- Determine whether a file is open in Acrobat 8 or another Adobe Creative Suite application on your computer.
- Rename or delete files (Mac OS only).
- View metadata about files in the Properties panel. Metadata includes author, keyword, and copyright information.
- Access Version Cue projects and files as well as non-Version Cue files.
- View detailed information about Version Cue projects, such as the status of individual files.
- View and work with Version Cue versions.
- Search for files in a Version Cue project.
- Move Version Cue files to the Project Trash.
- Determine which Version Cue files are in use, and who is using them.
- Create a new Version Cue project, or connect to an existing Version Cue project.

### See also

"View Version Cue Workspace, project, and file information" on page 340

"Availability of Version Cue features" on page 336

## Turn Version Cue on or off

By default, access to Version Cue is turned off in Acrobat 8. You must manually turn on Version Cue in Acrobat 8 to use it. If you disable Version Cue, you won't have access to any Version Cue Workspace.

For information about turning Version Cue on or off in Adobe Creative Suite components, see Adobe Creative Suite Help.

**1** Choose Edit > Preferences > Documents (Windows) or Acrobat > Preferences > Documents (Mac OS).

**2** Select or deselect Enable Version Cue File-Version Manager.

### See also

"Availability of Version Cue features" on page 336

# Working with Version Cue projects

## About Version Cue projects

Version Cue uses *projects* to store related files and folders. Projects are stored on Version Cue Workspaces.

If you work independently, you create a project to gather all the files you need and use Version Cue features, such as versions. In a workgroup, depending on your workflow, you can create one Version Cue project for files that everyone in your workgroup collaborates on, a different project for files that don't require collaboration, and yet another project restricted to specific users.

When you first open a Version Cue project, Version Cue creates a folder named "Version Cue" in your My Documents (Windows) or Documents (Mac OS) folder, and adds a folder for the project to it. When you open a file from that project, Version Cue adds a *working copy* of the file to the project folder. As you edit and save intermediate changes to your file, you are actually editing in the working copy; the original file on the Version Cue Workspace is protected.

After you open a Version Cue project, a shortcut to that project appears in the Open or Save dialog boxes. Remote Version Cue Workspaces also appear in this list after you access them.

Version Cue uses a special folder for each project: the *documents* folder. When you access the project, Version Cue automatically opens the documents folder and temporarily displays the project title as the folder name. You'll also see the documents folder if you open the working copies folder.

### See also

"About working copies" on page 344

"Availability of Version Cue features" on page 336

## Open a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open. If the button is visible, click Use Adobe Dialog (if you see the Use OS Dialog button, you're already using the Adobe dialog box). Click Version Cue in the Favorites panel.

**2** To open a Version Cue Workspace, double-click it.

***Note:*** *If you don't see a desired Version Cue Workspace, choose Refresh from the Tools menu.*

**3** To open a project, double-click it.



*If the Use Adobe Dialog button doesn't appear in the Open or Save As dialog boxes, make sure that you've turned on the Version Cue preference in Acrobat.*

### See also

"About the Adobe dialog box" on page 337

"Connect to remote projects" on page 340

"Adding files and folders to a project" on page 346

## Connect to remote projects

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

When you need to work on Version Cue projects that are located remotely, on a different subnet, you can use the IP address of the computer to access that Version Cue Workspace. Workspaces on computers within your subnet should be visible automatically.

The Version Cue Workspace can communicate with applications that are WebDAV enabled. When Version Cue is running on a server, you can use it as a WebDAV server. However, the native versioning features in Version Cue are more sophisticated than those available through WebDAV. WebDAV capabilities are provided for legacy workflows.

### See also

"About the Adobe dialog box" on page 337

"Log in to and out of the Version Cue Administration utility" on page 359

"Availability of Version Cue features" on page 336

#### Connect to a remote project

**1** Choose File > Open. If you are using the OS Dialog box, click Use Adobe Dialog. Click Version Cue in the Favorites panel. Choose Connect To from the Project Tools menu .

**2** In the Connect To dialog box, enter the Version Cue Client URL (the Version Cue IP or DNS address), a colon, and the port number (3703)—for example, http://153.32.235.230:3703. If you have connected to the workspace before, it's not necessary to enter the port number.

*You can display the Version Cue Workspace Administration utility login page to identify the Version Cue Client URLs that remote users and WebDAV applications need to access the workspace.*

**3** Click OK. After you connect to a remote Version Cue Workspace, the dialog box displays all available Version Cue projects in that workspace.

A shortcut to the remote workspace is automatically included in your list of available Version Cue Workspaces.

#### Connect to a project using WebDAV

❖ Refer to your application's documentation for information on using its WebDAV features, and then use the Version Cue WebDAV Client URL, the port number (3703), "webdav", and the project name to identify the project you want to work with—for example, http://153.32.235.230:3703/webdav/*project_name*.

## View Version Cue Workspace, project, and file information

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open.

**2** If the button is available, click Use Adobe Dialog (if you see the Use OS Dialog button instead, you are already using the Adobe dialog box).

**3** Click Version Cue in the Favorites panel.

*You can resize the Favorites panel to display items with long names: place your cursor over the vertical line to the right of the Favorites panel and drag it to the right.*

**4** To change the display of Version Cue Workspaces, projects, or files in the dialog box, do any of the following:

- To view the properties of a file, click the toggle to display the Properties panel.
- To change the display of a project, choose a display option from the View menu .
- To sort items in a column, while in detail view, click the column heading. Click the column heading again to reverse the order.
- To show or hide columns of information while in list view, right-click/Control-click the Name column heading, and choose Show All, Hide All, or a column name. (The Name column can't be hidden.) Visible columns have a check mark to the left of the column name.
- To change the location of a column, drag the column heading to the left or right of another column heading (Windows), or press Command+Option and drag the column heading to the left or right of another column heading (Mac OS). The Name column can't be moved.
- To resize a column of information, drag the vertical dividing line between column headings or double-click the line to automatically resize the column to fit the widest item in it.

**5** To display information about a file, project, or Version Cue Workspace, do one of the following:

- Place the pointer over the item. A summary of file information appears in a tool tip.
- Right-click/Control-click the file and choose Versions to display information about a file's versions.

### See also

"About the Adobe dialog box" on page 337

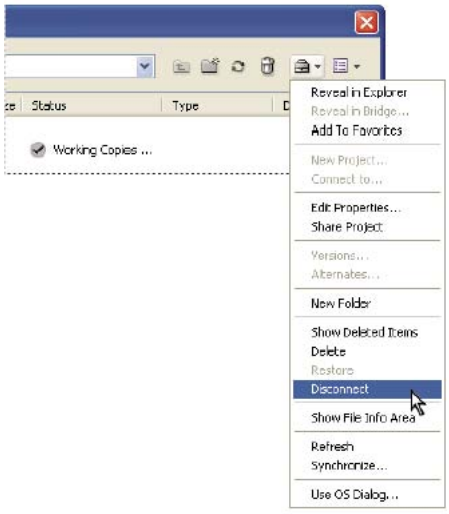
"Version Cue file statuses" on page 345

## Create and edit projects

To begin using Version Cue, you need to create a Version Cue project. When you work with Version Cue, you decide what a project entails. For example, you can create a project to organize files for an entire publishing effort, or you can create a project to manage files for specific aspects of an advertising campaign. You can use a project to organize assets related to a particular customer or use a project to separate private files from files that are worked on collaboratively. You can add files to projects at any time.

When you create a Version Cue project, you specify a project name, the Version Cue Workspace that hosts the project, and a project description. You specify whether to share the project or keep it private. Shared projects are available to other users; however, you can password-protect shared projects to restrict access to specific users. You can create private projects on a workspace installed on your computer. If you create a project on a computer that is used as a server, it must be shared to be accessible.

You can create projects by using an Adobe Creative Suite component, InCopy, Acrobat 8, or the Version Cue Administration utility. The Version Cue Administration utility provides options for specifying advanced project properties. You create new Version Cue projects with it by importing a folder of files. These files are used as the project starting point.




*Project Tools menu contains frequently used commands.*

## See also

"Share or unshare a project" on page 343

"Availability of Version Cue features" on page 336

"About the Adobe dialog box" on page 337

"Disconnecting from projects" on page 350

"Delete files and folders" on page 351

"Log in to and out of the Version Cue Administration utility" on page 359

### Create a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

**2** Click Version Cue in the Favorites panel.

**3** Choose New Project from the Project Tools menu .

**4** Choose a location for the project from the Location menu.

**5** Enter a name for the project in the Project Name box and a description in the Project Info box. (The description you enter appears as a tool tip when the pointer is over the project in the list of workspaces.)

**6** To make this project and its files available to others, select Share This Project With Others. (If the Version Cue Workspace is on a computer other than your own, the Version Cue project is shared by default.)

**7** Click OK.

### Edit the properties of a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box. Double-click the host Version Cue Workspace. Select the project, and then choose Edit Properties from the Project Tools menu.

**2** In the Edit Properties dialog box, do any of the following, and click Save:

- To change the project name, enter a name in the Project Name text box. The new name will not be reflected on your (or your workgroup's) working copies project folder until you disconnect from and reconnect to the project.
- To change the description of the project, enter text in the Project Info box.
- To make this project and its files available to other users, select Share This Project With Others. (If the Version Cue Workspace is on a computer being used as a server, the Version Cue project is shared by default.) To unshare a shared project, deselect Share This Project With Others. Note, however, that this action does not delete any working copies currently in project folders on the workgroup's computers.
- To view the location of working copies on your computer, expand Local Project Files. To open the folder, choose Show Files In Explorer (Windows) or Show Files In Finder (Mac OS). To change the location of the files, click Change Location and choose the new location for working copies.

***Note:*** *Make sure that you use the Change Location feature to relocate working copies, rather than moving the project folder manually in the file system.*

- Click Advanced Administration to enable lock protection, edit or assign users, or require users to log in to the project. When prompted, log in to Version Cue Administration. Depending on your privileges, this option may not be available.

**3** Click Cancel to close the Open dialog box (Version Cue saves your settings even though you clicked Cancel).

## Share or unshare a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

At any time, you can change a project's shared status. Projects on a Version Cue Workspace that other users can access are shared by default and can't be made private. Note that unsharing a project does not delete any working copies currently in the working copies project folders of your workgroup.

***Note:*** *If the Version Cue Workspace is installed on a computer that uses a firewall and you want to share the workspace with others, make sure that TCP ports 3703 and 427 are left open. If you're using a Windows machine, deselect the Internet Connection Firewall option. (For information on the Internet Connection Firewall option, see Windows Help.)*

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS Open dialog box.

**2** Click Version Cue in the Favorites panel, and then double-click the host Version Cue Workspace.

**3** Select the project, and then do one of the following:

- To share the project, choose Share Project from the Project Tools menu .
- To unshare the project, choose Unshare Project from the Project Tools menu.
- Choose Edit Properties from the Project Tools menu. Select or deselect Share This Project With Others, and click Save. After you edit the project properties, click Cancel to close the Open dialog box (your settings are saved even though you clicked Cancel).

### See also

"About the Adobe dialog box" on page 337

"View Version Cue Workspace, project, and file information" on page 340

# Working with files in Version Cue

## About working copies

Version Cue projects and files reside in the Version Cue Workspace on the host computer. The master copies of files added to the project, including file versions and other file data, such as comments, version dates, and user IDs, are saved on this host computer. When you work in files from a Version Cue project, you're editing a *working* copy of the master file on your computer, not the master file on the Version Cue Workspace, which remains protected and untouched.

As you work, use the Save command to save changes periodically. This command does not create a new version of the master file but updates your working copy. A new version is created only when you choose the Save A Version command. This command first updates the working copy, and then adds a new version to the master file on the Version Cue Workspace. When the working copy of a file matches (is the same version as) the current version in the workspace, the file is *synchronized*.

Using working copies of master files, several people can work with the most recent version of a master file. For example, if two people need access to the same illustration during overlapping periods of time, Version Cue lets each person work with a working copy of the most recent file version. The second person to access the illustration is informed that the file is already in use. At that time, the second person can decide whether to continue working with the file.

Working copies allow you to work on a file even when the host workspace is unavailable, or offline. Though some features, such as versions, can't be used when you're working offline, you can edit files and save your work. When the workspace is online again, you can save a version to update the master file.

There are times when you may wish to delete the working copies of your project files. For example, you may want to free up space on your hard drive, or are completely finished working on the project. Disconnecting from a project deletes the working copies project folder on your hard drive. You can do this at any time if none of the working copies are In Use by you. If you accidentally disconnect from a project, new working copies are recreated the next time you access the project files. If a project is deleted from either the host workspace or your local computer, you can use working copies to recreate the project with the most current versions of the files.

To relocate working copies of a project, edit the project's properties and use the Change Location feature. For instructions, see "Create and edit projects" on page 341.

### See also

"Disconnecting from projects" on page 350

"Delete files and folders" on page 351

"Editing and synchronizing offline files" on page 355

"Restore a file or folder deleted from a project" on page 352

"Version Cue file statuses" on page 345

"Availability of Version Cue features" on page 336

## File protection in Version Cue

Version Cue automatically informs others that a file is being edited. Version Cue assigns In Use status to a file when you open and edit a file that isn't being edited by another user. When you save a version, Version Cue removes the file's In Use status.

At times two people may need to work with a file simultaneously. For example, User A may begin editing a file but be called away before saving a version. If User B works on the file while User A is away, Version Cue ensures that the two files don't overwrite each other in the project. User A's working copy won't reflect the changes made by User B, and vice versa. When finished with the file, both users can save a new version of the file to the Version Cue Workspace. Version Cue alerts all current users of the file about the presence of a new version in the Version Cue Workspace and gives them the option of downloading the latest version or continuing their current edits. (Version Cue alerts users who have the file open or who reopen a file that was previously closed while In Use.)

You can use the Version Cue Workspace Administration utility to assign lock protection to a Version Cue project. Only the first user to begin editing an available file in a lock-protected project can save the next version of that file to the Version Cue project. Other users who edit that file simultaneously can't save changes to a new version of that file, even after the first user saves a version. These other users must save the changes as completely new files with their own version thread.

### See also

"About working copies" on page 344

"Availability of Version Cue features" on page 336

## Version Cue file statuses

Files that are managed by Version Cue are always marked with a status icon that describes the state of the file on the Version Cue Workspace. You can view a file's status while browsing the files in a Version Cue project. A file can have more than one status at the same time (in some cases only one status is shown).

Each file status has a corresponding icon:

**Open** The file is open on your computer. This status lets you make informed decisions about whether it's appropriate, for example, to place a file into a layout while the file is still being edited. The Open status is indicated only for files on your computer.

**In Use By Me** You are editing the file. Version Cue assigns this status to a file when you make an edit to the file that changes its content.You can manually mark a file In Use before you edit it to indicate to others that you intend to make changes to the content.

**Synchronized** The latest known version of the file is available for editing and you have a working copy of it on your computer. Version Cue assigns this status when you save a version of the file you're editing, or when you manually synchronize a project.

**No Working Copy** No local copy of the file exists. This status indicates that it will take a few moments to create a working copy before you can edit the file.

**In Use By [user name]** Another user is editing the file and has not yet saved a new version.

**Conflicted Copies** There is a version conflict, or both you and another user are editing the file.

**Only Copy** The file in the working copies folder is the only copy known to Version Cue and has not been synchronized with the Version Cue Workspace. This scenario can occur when a file has been saved in an existing project for the first time while the workspace is offline. Because the workspace is offline, Version Cue displays the Offline Copy status until the workspace is back online, and then changes the status to Only Copy. Version Cue also displays this status if you drag a file from one folder into the working copies folder using the file system instead of Bridge (not recommended). You can edit the file, but it's important to synchronize (upload the file to the workspace) after you save your changes.

**Offline Copy** There is a local copy of the file in your working copies folder, but the Version Cue Workspace is offline. There is no way of checking whether the local copy is synchronized with the latest version on the workspace. You can edit an offline copy and save these changes; however, you must save a version or synchronize the file once the workspace comes back online.

**Outdated Copy** A local copy exists, but there is a newer version of the file in the workspace. This status indicates that it will take a few moments to create an up-to-date working copy before you can edit the file.

**Unavailable** The Version Cue Workspace is offline or you don't have access privileges. There is no way of checking the status of the local copy with the workspace. You can edit the local copy and save these changes; however, you must save a version or synchronize the file once the workspace comes back online.

**Deleted** The file or folder has been deleted from the project, but not yet permanently erased. (You can restore a deleted file or folder).

### See also

"About working copies" on page 344

"Synchronize files" on page 357

"Edit a file in use by another user" on page 348

"Delete files and folders" on page 351

"Availability of Version Cue features" on page 336

## Adding files and folders to a project

To save versions of a file and take advantage of Version Cue file management, you must add or save the file to a Version Cue project. You can add assets such as swatch libraries to projects to share them with your workgroup. You can also add non-Adobe files to Version Cue projects. You can add files using any of the following methods:

- Add files one at a time from within InCopy, an Adobe Creative Suite component, or Acrobat 8.
- Place files directly in the project's working copies folder, and then synchronize the project to add the files. For more information, see "About Version Cue projects" on page 339.

### See also

"Create and edit Version Cue projects" on page 362

"Availability of Version Cue features" on page 336

"About the Adobe dialog box" on page 337

"Editing and synchronizing offline files" on page 355

### Add a file to a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Open the file.

**2** Choose File > Save As. Click Use Adobe Dialog if you're using the OS dialog box.

**3** Double-click the host Version Cue Workspace.

**4** Double-click the project to open it.

**5** Enter a comment for the first version in the Version Comments box, and click Save.

### Add files to a project folder

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

You can add files by dragging them into the documents folder of a Version Cue project.

**1** Do one of the following:

- Locate the project folder inside the My Documents/Version Cue (Windows) or Documents/Version Cue (Mac OS) folder on your computer.
- If the project folder isn't already in the My Documents/Version Cue (Windows) or Documents/Version Cue (Mac OS) folder on your hard disk, create a new folder inside the Version Cue folder. Give the folder the same name as the existing Version Cue project on the Version Cue Workspace. Inside the new project folder, create a new folder and name it "documents."

***Note:*** *These steps work only if the project already exists. You cannot create a new project using this method.*

**2** Move or copy the items you want to add to the documents folder.

**3** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

**4** Click Version Cue in the Favorites panel. Open the Version Cue Workspace, and select the project.

**5** Choose Synchronize from the Project Tools menu . Once the synchronization is complete, the files are added to the project.

## Open a file from a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

After you add or save a file to a Version Cue project, the file is automatically managed by Version Cue.

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box, and then click Version Cue in the Favorites panel.

**2** Double-click the host Version Cue Workspace.

**3** Double-click the project that contains the file you want to open.

**4** Select the file and click Open.

### See also

"Edit a file in use by another user" on page 348

"Update a file with the most recent version" on page 348

"About the Adobe dialog box" on page 337

"Search for files in a project" on page 349

## Edit a file in use by another user

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

If you don't notice that a file's status is In Use when you open it, Version Cue displays an In Use By alert to remind you that someone else is already editing a working copy of the file.

**1** Open the file, and click one of the following options when the In Use By alert appears:

**No, Close Document** Closes the file without any alterations.

**Yes, Keep Open** Keeps the file open so you can work on the document.

**2** If you continue working with the document and make a change to the content, Version Cue displays an alert to remind you that there is the possibility of creating conflicting copies. Click one of the following:

**Discard Changes** Displays the most recent version of the file from the Version Cue Workspace and discards your changes to the working copy.

**Continue Editing** Lets you edit the working copy without overwriting the changes made in another user's working copy of the same file (Version Cue will prompt each user to save a new version of the file).

**3** If the project doesn't have lock protection applied to it, you can save a new version of your edits. Version Cue displays an alert warning you that conflicting edits will occur if you continue. Click one of the following:

**Cancel** Returns you to the open document without saving a version.

**Save Version Anyway** Updates the master file in the Version Cue Workspace with the new version. (Version Cue displays an alert to the other user to note that a newer version of the file has been created by you.)

At any point, you can close the document and discard any changes you've made.

### See also

"Update a file with the most recent version" on page 348

## Update a file with the most recent version

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

If another user creates a new version of a file that you have open or that is still marked In Use By Me, Version Cue prompts you to update your document with the latest version when you open it or attempt to make changes to it, or when you bring the document window frontmost in a group of documents.

❖ When the prompt appears, click one of the following:

**Discard Changes** Updates the document with the most recent version from the Version Cue project. You can continue editing the file after it is updated. You lose any changes you've made even if you have already saved those changes to the working copy with a Save command.

**Continue Editing** Leaves the document as is. You can continue editing the file without overwriting the changes in the more recent version. Instead, you're prompted to either save a new version of the file when you close it, or to discard your changes.

### See also

"Edit a file in use by another user" on page 348

## Save changes to a file

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

If you want to save changes, but you aren't ready to save a new version as you edit a file you have opened from a Version Cue project, you can use the File > Save command to save your changes to the working copy on your computer. Until you save a new version to the shared Version Cue Workspace, these changes won't be available to any other user. You can also close the file once you save changes to a file, and then reopen it and save a version later.

❖ To save changes to your working copy, choose File > Save.

## Search for files in a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

Metadata is automatically added to Version Cue project files as you work with them. You can quickly locate files in a Version Cue project by searching for specific information such as titles, authors, copyright data, keywords, dates, and locations. The search feature searches through existing files, as well as files deleted from projects.

**1** Choose File > Open.

**2** If the button is visible, click Use Adobe Dialog (if you see the Use OS Dialog button instead, you are already using the Adobe dialog box).

**3** Click Version Cue in the Favorites panel.

**4** Double-click the host Version Cue Workspace.

**5** Double-click the project you want to search.

**6** Click Project Search .

**7** Enter information in Project Search.

If you open an older version of a file found as the result of a search, the filename will be prefaced with "Version <X> -".

***Note:*** *It is best to treat older versions as view-only when opened as the result of a search. Although you can edit an older version in its native application, do so only if you intend for this version to become a separate asset. To edit a previous version, first promote it to the new, current version, and then make changes.*

### See also

"About the Adobe dialog box" on page 337

"Version Cue file statuses" on page 345

"View and compare versions" on page 354

# Disconnecting from projects

## Disconnecting from projects

*Disconnecting* from a project erases the working copies of files on your computer while leaving the master copies on the Version Cue Workspace intact. Disconnecting also removes shortcuts to the project from the Adobe dialog box. You may want to disconnect to free up more space on your hard drive. Or, you might disconnect from a project if someone else in your workgroup deletes a project from the Version Cue Workspace (your working copies are not touched by that deletion).

As long as you have saved a version of the working copies there is no harm in discarding them by disconnecting. When you access the project again, new working copies will be created for the current versions of the files you open. If you have working copies with the In Use By Me status, you will not be permitted to disconnect from a project until you have saved a version of those files.

When you disconnect from a project, only the working copies and shortcuts on your computer are erased. Leaving the project intact on the workspace allows others, as well as yourself, to access the master files. When you delete a project, all working copies and shortcuts on your own computer, along with the master copies of files and folders in the Version Cue Workspace, are erased. However, any working copies and shortcuts on other computers your co-workers or you previously used to access the project are not erased. To completely remove the project and erase those working copies and shortcuts, you must select the shortcut or project folder and disconnect, even though the project has already been deleted.

### See also

"Delete files and folders" on page 351

"Disconnect from a project" on page 350

"About working copies" on page 344

"Availability of Version Cue features" on page 336

## Disconnect from a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

Disconnecting from a project removes the files from your computer but doesn't delete the project from the host Version Cue Workspace.

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

**2** Click Version Cue in the Favorites panel.

**3** Open the Version Cue Workspace and select the project from which you want to disconnect.

**4** Choose Disconnect from the Project Tools menu.

***Note:*** *You can select any project icon or shortcut to the project when you want to disconnect.*

# Deleting files, folders, and projects

## Delete files and folders

*Deleting* a file or folder from Version Cue is a two-step process that safeguards against accidental deletions. The first step is deleting the file or folder and giving it the Deleted status. Deleting hides the file or folder from normal view but does not erase it. The second step is permanently deleting and erasing the file or folder and its previous versions.

When you delete a folder, the folder and all folders and files nested inside it are hidden and given a Deleted status. When you permanently delete a folder, its entire contents are erased.

Any user with appropriate privileges can delete files and folders unless the files or folders are marked In Use. In a workgroup, if a user is editing a file that you need to delete, you can reset the file's lock by using the Version Cue Administration utility.

You can restore files or folders that have a Deleted status. Restoring reinstates Version Cue management. Restored files and folders appear in their previous location in the project folder hierarchy. (Deleted files and folders maintain their relationship within the project hierarchy until they are permanently deleted.)

You can show hidden and deleted files or folders, and view them in search results. Additionally, Version Cue has a Project Trash view from which you can view all deleted files in a project. Use Project Trash to view and handle all deleted files without navigating through the project folder hierarchy.

### See also

"About working copies" on page 344

"Manage Version Cue projects" on page 365

"Availability of Version Cue features" on page 336

"View Version Cue Workspace, project, and file information" on page 340

#### Delete files or folders from a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

**2** Click Version Cue in the Favorites panel.

**3** Double-click the host Version Cue Workspace.

**4** Double-click the project that contains the file or folder you want to delete.

**5** Select the file or folder you want to delete.

**6** Do one of the following:

- Choose Delete from the Project Tools menu 
- Click the Delete icon .

***Note:*** *If Show Deleted Items is not selected in the Project Tools menu, the file will become hidden and removed from view. If Show Deleted Items is selected, the file or folder will remain visible with the status Deleted.*

#### Delete a file or folder permanently

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

**2** Click Version Cue in the Favorites panel.

**3** Open the Version Cue Workspace and project that contains the file or folder you want to delete permanently.

**4** Choose Show Deleted Items from the Project Tools menu.

**5** Select the file or folder you want to permanently delete, and choose Delete Permanent from the Project Tools menu.

**6** Click OK.

## Delete a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

Deleting a project from Version Cue permanently erases all of its master files (including versions) and folders from the Version Cue Workspace. This is a one-step process (with confirmation). Deleting a project automatically deletes the working copies of files on your computer as well as any shortcuts to that project. However, the working copies of files created on other users' computers are not deleted until they disconnect from the deleted project. You cannot restore deleted projects directly in Version Cue, nor can you delete a project if any user has files that are marked In Use.

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

**2** Click Version Cue in the Favorites panel.

**3** Do one of the following:

- Double-click the host Version Cue Workspace and select the project.
- Click the project shortcut.

**4** Choose Delete from the Project Tools menu.

**5** Click OK in the confirmation dialog box.

You can also delete projects using the Version Cue Administration utility.

### See also

"Manage Version Cue projects" on page 365

"Disconnect from a project" on page 350

"About the Adobe dialog box" on page 337

## Restore a file or folder deleted from a project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Double-click the host Version Cue Workspace.

4 Double-click the project that contains the file or folder you want to restore and do one of the following:

- Click Project Trash in the Favorites panel, select the file you want to restore, and choose Restore from the Project Tools menu .
- Choose Show Deleted Items from the Project Tools menu (deleted file and folder names appear in gray in the dialog box). Select the file or folder you want to restore, and choose Restore from the Project Tools menu.

5 Choose Refresh from the Project Tools menu to update the dialog box.

The file or folder is restored to its original location in the Version Cue project.

***Note:*** *To restore a file in a previously deleted folder, you must first restore the folder. Doing so restores the folder and all its contents.*

# Version Cue versions

## About Version Cue versions

Versions provide a convenient method of retaining work that was performed in different stages. At any point in your design process, you can save a version of the file, which Version Cue saves and tracks. Each version is a snapshot of the file. You can use versions to review ideas or changes with team members or a client before selecting a final version, or to recover from destructive changes.

Version Cue prevents users from overwriting each other's work. With this protection capability, multiple users can work on a file simultaneously. When more than one user is working on a file, Version Cue alerts them all when one user saves a new version, allowing everyone to update the file and work in the latest version.

You don't have to save a version every time you save your changes. Using the File > Save command works the same way in Version Cue-managed files as in non-Version Cue files. You need only save a version when you want to create a snapshot of the file. Instead of choosing File > Save As and saving a new copy of a design, you save a version, which allows you to track changes as they occur.

If you want to continue your work using a previous version instead of the current version, promote the previous version to the next current version (do this instead of opening the previous version directly). This process keeps the previous version intact, should you decide to return to it again in the future. If you want a previous version, along with the current version, to be available for use in a project, you can save the previous version as a separate asset.

You can view previous versions in their native applications. When you no longer need to keep previous versions of files, you can delete them individually or in batches.

### See also

"View and compare versions" on page 354

"Availability of Version Cue features" on page 336

## Save a version

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

To save a new version of a file, you use the Save A Version command, which saves your changes to the Version Cue Workspace.

1 Choose File > Save A Version.

2 In the Save A Version dialog box, enter comments you want to associate with this version.

3 Click Save.

## View and compare versions

Versions are always available for you to view and compare. The Versions dialog box displays thumbnails of all file versions alongside comments, dates, and the login name of the user who created the version. Each version is numbered sequentially. You can view any version at any time. You can also *promote* a version, that is, make a previous version the current one. You can also delete versions if they are irrelevant or if you need to save disk space. When you delete older versions, the version numbers of the remaining versions remain the same.

The commenting features of Version Cue maintain a descriptive history of files. Each time you save or promote a version, you can describe what changes you made. This history helps you track changes made at different stages. Also, your version comments are searchable; you can search for a particular word to find a version quickly.

### See also

"Availability of Version Cue features" on page 336

"About the Adobe dialog box" on page 337

#### View versions

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Double-click the host Version Cue Workspace. Double-click the project to open it.

4 Click the name of the file whose versions you want to view.

5 Choose Versions from the Project Tools menu .

6 In the Versions dialog box, do any of the following:

- To create a new file version from an older version, select the version and click Promote To Current Version.
- To open an earlier version in its own window and view details only or create a separate asset from the earlier version, click View Version. The version number appears in the file's title bar to remind you that you shouldn't edit it.
- To delete a version, select the version and click Delete.

#### View a previous version in its native application

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

❖ In the Versions dialog box, click the version you want to open and click View Version.

***Note:*** *The file status is Never Saved, because the previous version is only a snapshot of a previous stage of a file.*

Version Cue opens the previous version in its own window. You can then edit the previous version and save it as a new asset. If you edit the previous version, your changes won't be reflected in the current version unless you promote the earlier version.

### Promote a version

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

Promoting a previous version automatically saves a copy of that previous version as the current version. Any changes made between its creation and promotion don't appear in the new current version.

1 In the Versions dialog box, select the version you want to promote, and click Promote To Current Version.

2 Type a version comment in the Save A Version dialog box. Then click Continue to complete the promotion.

### Delete a version

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

❖ In the Versions dialog box, click the version you want to delete and click Delete. To delete multiple versions, Shift-click/Control-click the versions and click Delete. When prompted, confirm the deletion.

Note that the remaining versions are not renumbered.

*Using the Version Cue Administration utility, you can delete multiple previous versions of all files in a project simultaneously. By using this method, you can retain past versions by date or by number of versions to keep. See "About the Version Cue Administration utility" on page 357.*

#### See also

"Manage Version Cue projects" on page 365

"Create and edit Version Cue projects" on page 362

# Editing and synchronizing offline files

### Editing and synchronizing offline files

When you need to work on files from a Version Cue project while the Version Cue Workspace is unavailable on the network, you can edit working copies on your computer. When the Version Cue Workspace is available again, you must *synchronize* your files with the workspace to save your latest version to the Version Cue Workspace. You can synchronize an entire project, just a folder in the project, or a selected file.

Working copies are normally copied on your computer when you open a project from an online workspace. However, if you haven't yet edited the file, you can prepare to work offline by synchronizing the entire Version Cue project, or just the files you need, while the workspace is still online to ensure that you have working copies.

When you are working offline, you can't create multiple versions because the Save A Version command is unavailable.

In Version Cue, if you intend to work on a file offline, you can manually mark the file In Use before you take your work offline. When you mark a file In Use, Version Cue creates a working copy of the file for you. When a file's status is In Use, Version Cue protects the file. When you synchronize your file, the status of the file returns to Synchronized.

### See also

"Availability of Version Cue features" on page 336

## Manually mark a file as In Use

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open. Click Version Cue in the Favorites panel, and then navigate to the file. Select one or more files. Right-click/Control-click a file, and then choose Mark In Use.

**2** When you finish editing the file offline and the Version Cue workspace is again available, synchronize the file. Version Cue automatically creates a new version of the file. If the workspace becomes available while you still have the file open, simply save a version.

If you haven't made any changes, you can manually cancel the In Use By Me status, by choosing Cancel Mark In Use from the context menu.

### See also

"Synchronize files" on page 357

## Edit working copies of files from an offline project

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

**2** Click Version Cue in the Favorites panel.

**3** Double-click the host Version Cue Workspace.

**4** Double-click the Version Cue project that contains the file. It may take Version Cue a few seconds to verify that a Version Cue Workspace or project is unavailable.

**5** Double-click a file to open it (the Offline Copy status allows you to open the file).

**6** When you finish editing the file, choose File > Save As to save the changes to the working copy. When the Version Cue Workspace becomes available again, synchronize your files.

### See also

"Editing and synchronizing offline files" on page 355

"Synchronize files" on page 357

### Synchronize files

***Note:*** *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 336 for more information.*

**1** Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

**2** Click Version Cue in the Favorites panel.

**3** Select the project that contains the master file, and do one of the following:

- To synchronize the entire project, choose Synchronize from the Project Tools menu .
- To synchronize just a folder or one or more files, open the project, select the folder or files that you want to synchronize, and choose Synchronize from the Project Tools menu.

**4** If the master file on the Version Cue Workspace is newer than your working copy and you've edited the working copy, a File Conflict dialog box appears. Specify one or more of the following:

**Apply The Following Action To All Subsequent Conflicts** Automatically applies the selected option every time there is a file conflict.

**Save a Version** Saves your working copy as a new file version to the Version Cue Workspace.

**Skip This File** Prevents the most recent version from the Version Cue Workspace from being downloaded. (This option also prevents a version of your working copy from being saved to the workspace.) Choose this option only if you want to keep your edits and disregard the other changes in the master file.

# The Version Cue Administration utility

### About the Version Cue Administration utility

Using the Version Cue Administration utility, you can do more advanced tasks that affect a specified project or an entire Version Cue Workspace. You have access to the Version Cue Administration utility if you use Adobe Creative Suite or if you have access to a shared project and that project's owner has granted you access permission to the Administration utility.

The following table lists the Version Cue-related tasks that you can accomplish through Adobe Creative Suite components or Acrobat and those that you can accomplish through the Version Cue Administration utility.

| Task | Acrobat or Adobe Creative Suite component | Version Cue Administration |
|---|---|---|
| Create, edit, and delete Version Cue projects | Yes | Yes |
| Share a project with anyone who is using Acrobat, Adobe Creative Suite, an Adobe Creative Suite component, or a WebDAV-enabled application | Yes | Yes |
| Delete a file version | Yes | Yes |
| Delete multiple file versions at once | Yes | Yes |

| Task | Acrobat or Adobe Creative Suite component | Version Cue Administration |
|---|---|---|
| Create Version Cue projects from remote files via FTP | No | Yes |
| Create Version Cue projects from remote files via WebDAV | No | Yes |
| Import Version Cue 1.0 projects | No | Yes |
| Back up Version Cue projects and restore backup versions of a project | No | Yes |
| View the amount of disk space a project uses, its lock protection status, its creator, and its creation date | No | Yes |
| Duplicate or export Version Cue projects | No | Yes |
| Edit Version Cue Workspace preferences | No | Yes |
| Add and edit users, and define their project privileges | No | Yes |
| Change the properties of a Version Cue project to require users to log in before accessing it | No | Yes |
| View all users and their privileges for all projects in the Version Cue Workspace | No | Yes |
| Remove all In Use locks in a project or those created by a specified user | No | Yes |
| View Version Cue Workspace logs and reports | No | Yes |
| Add files to an existing project | Yes | No |
| Create file versions | Yes | No |
| View file comments and other information | Yes | No |
| Search for files using file information (metadata) | Yes | No |
| Initiate and manage a web-based review of PDF files in Version Cue projects | No | Yes |

## Log in to and out of the Version Cue Administration utility

When you install Version Cue on your computer, Version Cue automatically creates a default user login ID with administrator privileges. You should change the password for this default user login, as it is publicly available for initial installation and setup. Until you change the default password, the default user login ID can only be used directly from the computer the Version Cue workspace is located on, not across a network. If Version Cue is installed on your computer, you can start using the web-based Version Cue Administration utility with the Version Cue default login ID (system) and password (system).

Users working in a group with a login ID and password can log in to the Version Cue Administration utility. The tasks that workgroup users can perform are limited by the privileges assigned to their Version Cue login ID by the administrator. However, users whose access level is set to None can't log in to the Version Cue Administration utility.

You can display the Version Cue Administration login web page in the following ways:

- By opening the Version Cue preferences and clicking the Advanced Administration button.
- By clicking the Advanced Administration button in an Adobe Creative Suite component or in Acrobat 8.
- By typing the IP address of the Version Cue Workspace directly into a web browser.
- By selecting Advanced Administration from the Version Cue system tray icon (Windows) or the Version Cue menu (Mac OS).

### See also

"Choosing user privileges" on page 370

#### Log in to Version Cue Administration from an Adobe Creative Suite component or from Acrobat 8

**1** Choose File > Open, and click Use Adobe Dialog.

**2** Select the Version Cue Workspace you want to administer.

**3** Choose Edit Properties from the Tools menu .

**4** Click Advanced Administration in the Edit Properties dialog box.

**5** Type your assigned Version Cue login ID and password in the text boxes. (The default for both the ID and password is "system.")

**6** Click Log In.

#### Log in to Version Cue Administration from a web browser

**1** In a web browser, type the IP or DNS address of the computer on which the Version Cue Workspace is installed. Precede the address with http:// and follow it with a colon and the port number—for example, http://153.32.235.230:3703 (IP) or http://*myserver.mycompany.com*:3703 (DNS). The default port number is 3703.

***Note:*** *If you have Version Cue 1.0 installed on your computer, the default port number for Version Cue 2.0 is 50800. Once Version Cue 1.0 is uninstalled, Version Cue 2.0 defaults to 3703.*

**2** A browser window displays the Adobe Version Cue Administration login page. Type your assigned Version Cue login ID and password in the text boxes. (The default for both the ID and password is "system.")

**3** Click Log In.

### Log in to Version Cue Administration from the Version Cue Preferences dialog box

**1** Do one of the following:

- (Windows) Double-click the Version Cue icon in the system tray and click Advanced Administration.
- (Windows) Right-click the Version Cue icon in the system tray and then choose Version Cue CS2 Preferences.




*On Windows, double-click the Version Cue icon to open preferences dialog box.*

- (Mac OS) Click the Version Cue icon at the top of the screen, and then choose Advanced Administration from the menu.
- (Mac OS) Control-click the Version Cue icon and choose Version Cue CS2 Preferences.

**2** Type your assigned Version Cue login ID and password in the text boxes. (The default for both the ID and password is "system.")

**3** Click Log In.

### Log out of Version Cue Administration

❖ Click Log Off at the top of the page.

## About Version Cue Administration integrity checks

Each time the Version Cue Workspace restarts, it performs an integrity check and performs repairs if necessary. To ensure best performance, restart the Version Cue Workspace periodically so it can perform the integrity check and self-repair.

## Set Version Cue Workspace Administration preferences

**1** Log in to the Version Cue Administration utility.

**2** Do one of the following:

- Click the Advanced tab, and then click Preferences.
- On the Home page, click Perform Advanced Tasks, and then click Preferences.

**3** Set any of the following options:

**Workspace Name** To change the Version Cue Workspace name, type a name in the text box. This name identifies the Version Cue Workspace in Acrobat or in Adobe Creative Suite components using Version Cue.

**Make This Version Cue Workspace Visible To Others.** When selected, gives other computers access to the Version Cue Workspace.

***Note:*** *If the Version Cue Workspace is installed on a Windows computer that uses a firewall and you want to share the workspace with others, make sure that TCP ports 3703 and 427 are left open and deselect the Internet Connection Firewall option (see Windows Help).*

**Only Grant Access To Existing Users** Specifies whether Version Cue projects are available to a user. Make sure to set access properties for each desired project and to edit the project's list of assigned users.

**Log Level** Defines the amount of information in reports generated by the Version Cue Workspace system. Choose a log level: Error to list only Version Cue Workspace errors; Warning to list workspace errors and warnings; or Info to list errors, warnings, and information about tasks performed.

**Log Size** Sets the maximum size, in kilobytes, for a system report. To reduce the log file size by saving it as a compressed GZ file, select Compress Log File.

**FTP Proxy** Specifies the default FTP Proxy server for users importing projects from or exporting projects to an FTP server, or publishing with GoLive to an FTP server.

**HTTP Proxy** Specifies the default HTTP Proxy server for users importing projects from or exporting projects to a WebDAV server, or publishing with GoLive to a WebDAV server.

**Color Scheme** Sets the background colors of the tabs.

**4** Click Save, and then restart Version Cue Administration.

## Migrate from Version Cue 1.0 to Version Cue 2.0

If you currently use Version Cue 1.0, you need to migrate your projects and user data to Version Cue 2.0. Keep the following in mind:

- Version Cue 1.0 and Version Cue 2.0 Workspaces can be installed and function on the same computer (using different ports) simultaneously.
- If Version Cue 1.0 and Version Cue 2.0 Workspaces are installed on the same computer, Adobe Creative Suite 1.0 components and Acrobat 7 work only with the Version Cue 1.0 Workspace, because they can communicate only with the port that the Version Cue 1.0 Workspace uses.

***Note:*** *If you uninstall the Version Cue 1.0 Workspace and then restart the Version Cue 2.0 Workspace, the Version Cue 2.0 Workspace then uses the Version Cue 1.0 Workspace's port, allowing Adobe Creative Suite 1.0 components, Adobe Creative Suite 2.0 components, and Acrobat 7 and 8 to work with the Version Cue 2.0 Workspace.*

- If only the Version Cue 2.0 Workspace is installed, Adobe Creative Suite 1.0 components and Acrobat 7 will work with it.
- Adobe Creative Suite 2.0 components and Acrobat 8 work only with Version Cue 2.0 Workspaces.
- Adobe Creative Suite 1.0 components and Acrobat 7 work with both Version Cue 1.0 and Version Cue 2.0 Workspaces simultaneously as long as the workspaces are not located on the same computer.
- You can import Version Cue 1.0 projects and users using the Version Cue Administration utility.

**1** After installing Version Cue 2.0, restart the Version Cue 1.0 Workspace. This activates a migration plug-in.

**2** Log in to the Version Cue Administration utility.

**3** Click the Advanced tab, and then click Import Version Cue 1.0 Data.

**4** Select the data you'd like to migrate to Version Cue 2.0:

- Projects and users. Click Next. Select the check box next to the names of any projects you want to import, and click Next. Then, select the check box next to the names of any users you want to import, and click Next.
- Only projects. Click Next. Then, select the individual projects you want to import, and choose whether to import all the users assigned to those projects (at this point, you cannot select individual users; you must import either all users or no users). Click Next. If you choose to import the users, select the users you want to import, and click Next.
- Only users. Click Next, and, in the next page, select the check box next to the names of any users you want to import.

**5** When the migration process is complete, verify the information you're importing, and confirm the migration.

**6** Uninstall Version Cue 1.0.

**7** Restart the Version Cue 2.0 Workspace. This step resets the port to allow access from both Acrobat 7 and 8, Adobe Creative Suite 1.0, and Adobe Creative Suite 2.0 components.

# Creating, editing, and managing projects in Version Cue Administration

## Create and edit Version Cue projects

You can create a new blank Version Cue project, a project from the files in a folder on the computer where the Version Cue Server is installed, or a project from a WebDAV or FTP server.

### See also

"Back up and restore projects" on page 367

#### Create a new blank Version Cue project

**1** Do one of the following:

- On the Home tab, click Create A Project.
- Click the Projects tab, and then click New.

**2** In the New Project content frame, click Blank Project to create an empty Version Cue project. Click Next to display the Create Blank Project content frame.

**3** Type a name for your project in the Project Name box.

**4** To specify how to treat the imported content's URL encoding, choose an option from the URL Encoding menu.

**5** Set any of the following options:

**Share This Project With Others** Gives other users access to the project. Users can be on your subnetwork, or they can be given the Version Cue Workspace IP or DNS address and port number to gain access to the Version Cue Workspace.

**Require Login For This Project** Ensures that only users with a Version Cue login ID and password have access to the project.

**Enable Lock Protection For This Project** Restricts file versioning to sequential versions.

**URL Encoding** Specifies how the content's URL encoding is treated. UTF-8 is the default setting.

**%HH Escaping** Requires that a nonsafe character be encoded as a percent symbol (%) followed by two hexadecimal digits.

**6** Click Save.

**7** If you chose to require login, do any of the following in the User Privileges content frame, and then click Save:

- Choose an option next to each user name in the Privileges column or choose an option from the Set All To menu to define each user's access. These options won't work unless you select Require Login For This Project.
- To let a user publish the project with GoLive CS2 to a specified FTP or WebDAV server, select the check box in the Publishing Privilege column next to the user name.

### Create a new Version Cue project from a folder

You can create a Version Cue project from the files in a folder on the computer where the Version Cue Workspace is installed.

**1** Log in to Version Cue Administration.

**2** Do one of the following:

- On the Home tab, click Create A Project.
- Click the Projects tab, and then click New.

**3** In the New Project content frame, click Import From Folder.

**4** If the content you're importing is a website, select Import Folder As A Website to import the content to the project's web-content folder. To specify the folder to import from, click Browse and select any file in the folder; then click Open. Alternatively, you can type the path to the desired Version Cue Workspace folder in the text box.

**5** Type a name for your project in the Project Name box.

**6** Set any of the following options:

**Share This Project With Others** Gives other users access to the project. Users can be on your subnetwork, or they can be given the Version Cue Workspace IP or DNS address and port number to gain access to the workspace.

**Require Login For This Project** Ensures that only users with a Version Cue login ID and password have access to the project. Note that if you select this option after a user gains access, the user can still gain access without logging in. Make sure that you change privileges as needed in the project's list of users.

**Enable Lock Protection For This Project** Restricts file versioning to sequential versions.

**Comments** Stores any remarks you type about the project.

**URL Encoding** Specifies how the content's URL encoding is treated. UTF-8 is the default setting.

**%HH Escaping** Requires that a nonsafe character be encoded as a percent symbol (%) followed by two hexadecimal digits.

**7** Do any of the following in the Assigned Users content frame, and then click Save:

- To define each user's access to the project, choose an option next to each user name in the Privileges column or choose an option from the Set All To menu. These options won't work unless you select Require Login For This Project.
- To let a user publish the project with GoLive CS to a specified FTP or WebDAV server, select the check box in the Publishing Privilege column next to the user name.

### Create a new Version Cue project from a WebDAV server or FTP server

**1** Log in to Version Cue Administration.

**2** Do one of the following:

- On the Home tab, click Create A Project.
- Click the Projects tab, and then click New.

**3** In the New Project content frame, do one of the following:

- Click Import From WebDAV Server.
- Click Import From FTP Server.

**4** If the content you're importing is a website, select Import FTP/WebDAV As A Website to import the content to the project's web-content folder.

- In the FTP Server or WebDAV Server box, specify the WebDAV server from which to import files, and type the port number in the Port box.
- To specify a folder, type its path in the Directory box.
- If a user name and password are required to access the server, type that information in the User Name and Password boxes.
- To use a proxy server to connect to the server, select Proxy.

**5** Type a name for your project in the Project Name box.

**6** To specify how to treat the imported content's URL encoding, choose an option from the URL Encoding menu.

**7** To comply with the URL syntax requiring nonsafe characters to be encoded as a percent symbol (%) followed by two hexadecimal digits, select %HH Escaping.

**8** Do any of the following and then click Next:

- To give other Version Cue or WebDAV users access to the project, select Share This Project With Others. (Users must either be on your subnetwork or be given the Version Cue Workspace IP or DNS address and port number.)
- To require users to log in with a Version Cue login ID and password before accessing the project, select Require Login For This Project. If selected, this option ensures that only Version Cue users you specify can log in and access the project.

***Note:*** *If you select this option after other users have already accessed the project without being authenticated, those users can still access the project without logging into it. Make sure that you change their privileges as needed in the project's list of assigned users.*

- To restrict file versioning to sequential versions, select Enable Lock Protection For This Project.
- To include remarks regarding the project, type them in the Comments box.

**9** Do any of the following in the User Privileges content frame, and then click Save:

- To define each user's access to the project, choose an option next to each user name in the Privileges column or choose an option from the Set All To menu.
- To let a user publish the project with GoLive to a specified FTP or WebDAV server, select the check box in the Publishing Privilege column next to the user name.

***Note:*** *You don't need to assign users in order to give others access to your Version Cue project. Just make sure to deselect Require Login For This Project in the project properties.*

### Edit Version Cue project properties

**1** Log in to the Version Cue Administration utility.

**2** Click the Projects tab, and then click a project name.

**3** Set any of the following options:

**Share This Project With Others** Gives other users access to the project. Users can be on your subnetwork, or be given the Version Cue Workspace IP or DNS address and port number.

**Require Login For This Project** Ensures that only users with a Version Cue login ID and password have access to the project. Note that if you select this option after a user gains access, the user can still gain access without logging in. Make sure that you change privileges as needed in the project's list of users.

**Enable Lock Protection For This Project** Restricts file versioning to sequential versions.

**Comments** Stores any remarks you type about the project.

**Backup Configuration** Allows you to back up your project or edit backup settings.

**4** Click Save, or click Reset to return the properties to their original values.

## Manage Version Cue projects

You can duplicate or delete Version Cue projects in the Version Cue Administration utility, as well as remove file locks and delete file versions.

Duplicate a project to start a new project with the same users and privileges. Version Cue duplicates the folder hierarchy within the project structure, and you can use that as a basis for the new project. Delete any files from the duplicated project that are no longer necessary.

A user with system administrator privileges or with project-specific administer privileges can remove file locks. Removing file locks forces the removal of the In Use status of files designated by specific project or by users throughout all the projects.

Delete file versions to improve performance. Each time you save a file version, the version is stored on the Version Cue Workspace database. This database creates a file version history that lets you quickly return to any former state of the file. Although a version history is useful, an extensive history takes up a lot of disk space and can degrade the performance of the Version Cue Workspace.

### Duplicate a Version Cue project

**1** Log in to the Version Cue Administration utility.

**2** Click the Projects tab.

**3** Select the check box next to the name of the project, and click Duplicate.

**4** In the Duplicate Project content frame, type a unique name for the project.

**5** Edit the project properties.

**6** Click Duplicate.

### Delete a Version Cue project in the Version Cue Administration utility

**1** Log in to the Version Cue Administration utility.

**2** Click the Projects tab, and do one of the following:

- To delete one or more projects, select the check box next to the name of each project you want to delete.
- To delete all listed projects, select the check box next to the Project Name column label.

**3** Click Delete. The Delete Project content frame appears. Click Delete again, or click Cancel to cancel the deletion.

### Remove file locks from a Version Cue project

**1** Log in to the Version Cue Workspace Administration utility.

**2** Click the Advanced tab , and then click Reset Locks (under Maintenance).

**3** Do any of the following:

- Choose a project from the Project Name menu.
- Choose a user from the User Name menu.

**4** Click Reset Locks to remove the specified file locks.

#### Delete file versions in a project

**1** Log in to the Version Cue Workspace Administration page.

**2** Click the Advanced tab, and then click Remove Old Versions.

**3** Choose a project from the Project Name menu.

**4** To delete versions, select Delete All Versions Older Than, and then choose a month, day, and year.

**5** To specify the maximum number of versions to remain in the workspace after you click Delete, select Number Of Versions To Keep, and then type a number in the text box.

**6** Click Delete.

## Export Version Cue projects

You can export the most recent version of all project files from the Version Cue Workspace. You can use this export to move these files from one host computer (or server) to another or to create a package of the most recent files for output or simply to create an archive of the final versions. Version Cue still manages projects moved between computers.

If you want to move a project, you should decide whether to back it up (so that all past versions are also moved) or export (so that only the current versions of project files are moved). For more information about backing up a project, see "Back up and restore projects" on page 367.

#### Export a Version Cue project to your computer

**1** Log in to the Version Cue Administration utility.

**2** Do one of the following:

- Click the Projects tab. Select the check box next to the project you want to export, and click Export.
- Click the Advanced tab, and then click Export Project. The Export Project content frame appears. Select the project you want to export from the Project Name menu.

**3** In the Export Project page, choose the name of the project you want to export, and then choose File from the Protocol menu.

**4** Click Browse, and specify the folder to which you want to export the project. Select any file in the folder, and click Open.

**5** Click Export.

#### Export a Version Cue project to an FTP or WebDAV server

**1** Log in to the Version Cue Administration utility.

**2** Do one of the following:

- Click the Projects tab. Select the check box next to the project you want to export, and click Export.
- Click the Advanced tab, and then click Export Project. The Export Project content frame appears. Choose the project you want to export from the Project Name menu.

**3** In the Export Project page, choose the name of the project you want to export and then choose either FTP or WebDAV from the Protocol menu.

**4** Specify the FTP or WebDAV server address in the Server Address text box. You don't need to precede the address with the chosen protocol. If you want, you can change the default port number in the Port box.

**5** To specify a folder, type its path in the Directory box.

**6** If a user name and password are required to access the server, type that information in the User Name and Password boxes.

**7** To use a proxy server to connect to the server, select Proxy.

**8** If you are connecting to the server through a firewall, or if you specified a port other than 21, select Use Passive Mode. (This is an option only if you choose FTP in the Protocol menu.)

**9** Click Export.

## Back up and restore projects

The Version Cue Administration utility creates backups of all the information in a Version Cue project. Project backups are stored on the Version Cue file system, in the Backups folder. You can then easily restore a backup copy that represents a Version Cue project as it was on a specific date. Restored project backups do not replace the original Version Cue project; restored projects are given different project names. You can use a project backup to move a project from one Version Cue Workspace to another while retaining all the versions of that project.

You can customize a backup configuration for your projects. You can back up a project using a new configuration or an existing configuration. A backup configuration includes the ability to schedule a recurring backup for the project.

It's important to back up projects in a Version Cue Workspace from time to time. Rather than doing this project by project, you can instead back up the complete Version Cue Workspace. You can also use this backup to move a complete workspace from one computer to another. If you restore a backup copy of the Version Cue Workspace, all current data on the workspace, including Version Cue projects, files, and versions, is replaced by the backup. Workspace backup files are saved to the default Backups folder in the Version Cue application folder.

To replace current projects on a Version Cue Workspace with a previous version, you first restore the backup. When you do this, Version Cue Administration turns off automatically. You must restart Version Cue on the host workspace; it cannot be done remotely.

### See also

"Create and edit Version Cue projects" on page 362

#### Back up a Version Cue project

The backup configuration used to back up a project is set in the Version Cue project preferences.

**1** Log in to the Version Cue Administration utility.

**2** Click the Projects tab.

**3** Select the check box next to the project name, and then click Backup.

**4** In the Backup Name text box, accept the name, or type a new name.

**5** Choose the project components you want to back up: Files (which is always selected), Project File Versions to back up all versions of the files, Project Metadata to back up embedded information entered in Acrobat or Adobe Creative Suite components, and Users/User Assignments to back up information about the users and their project privileges.

**6** Click Backup. When the backup is complete, a status page appears.

#### Restore a Version Cue project backup copy

**1** Log in to the Version Cue Administration utility.

**2** Click the Projects tab.

**3** Click Backup List.

**4** Click the name of the backup that you want to restore.

**5** In the New Project Name box, type a name that is different from those of other projects in the Version Cue Workspace.

**6** Do any of the following, and then click Restore:

- To retain the list of users that were assigned to the project, select Restore Users.
- To retain the same privileges for each assigned user, select Restore User Assignments.
- To add remarks, type them in the Comments box.

### Create a new backup configuration

New backup configurations are created in the project's preferences. When you create a new configuration, it becomes the default for the project.

**1** Log in to the Version Cue Administration utility.

**2** Click the Projects tab.

**3** Select the name of the project for which you want to create a new backup configuration.

**4** Under Backup Configurations on the Edit Properties page, click New.

**5** Type a name for the backup configuration in the Configuration Name box.

**6** Select what you want to back up in the Include list of options: Files (which is always selected), Project File Versions to back up all the versions of the project, Project Metadata to back up embedded information entered in Acrobat or Adobe Creative Suite components, and Users/User Assignments to back up information about the users and their project privileges.

**7** (Optional) Add remarks to the backup file in the Comments box.

**8** Choose an option from the Repeat menu if you want backups to occur automatically (choose Don't Repeat if you want to back up the project manually).

**9** Click Save to save the new configuration and to see a list of backup configurations.

### Back up all data in the Version Cue Workspace

**1** Log in to the Version Cue Administration utility.

**2** Click the Advanced tab , and then click Backup Version Cue Data.

**3** To add remarks about the workspace backup, type them in the Comments box.

**4** Click Save. After the backup is complete, click OK to view the list of workspace backups.

### Replace a project with a previous backup

**1** Log in to the Version Cue Administration utility.

**2** Click the Advanced tab, and then click Administer Backups.

**3** Click the name of the backup you want to restore. Click Restore. The Version Cue Workspace turns off. Close the browser. (Notice that the Version Cue icon in the system tray indicates that it's off .)

**4** Turn on the Version Cue Workspace.

**5** Log in to the Version Cue Administration utility.

# Working with users and privileges

## Create and edit users

All users with a Version Cue user name and login (except those whose access level is set to None) can log in to the Version Cue Workspace Administration utility. However, the tasks they can perform are limited by the privileges assigned to their user names.

To restrict the Version Cue projects that a user can access, you can edit the project's existing user names. Or, to restrict access further, you can create new Version Cue user names and assign them to a specific project. Creating new names gives you the most control over a project.

***Note:*** *Only users who have system administrator privileges can create new user names.*

If you've configured the Version Cue Workspace to be visible to others in the Version Cue Administration utility, you don't need to create and assign Version Cue user names to let other Adobe Creative Suite, Acrobat, or WebDAV users access your Version Cue projects and the Version Cue Workspace. The users simply need either to be on your subnetwork or be given the Version Cue Workspace IP or DNS address and port number. After a user accesses the Version Cue Workspace without using a Version Cue user name, the user name for the user's own computer is automatically added to the list of users in the Version Cue Workspace, and the password is left blank.

If you've configured the Version Cue Workspace so it grants access only to existing users, you'll need to create Version Cue user names to let other Adobe Creative Suite, Acrobat, or WebDAV users access your Version Cue projects and the Version Cue Workspace.

### Create new Version Cue user names

**1** Log in to the Version Cue Administration utility.

**2** Do one of the following:

- From the Home page, click Add A User.
- Click the Users tab, and then click New in the content frame.

**3** In the New User content frame, choose the level of access to give the user from the Admin Access Level menu:

**None** Denies the user access to the Version Cue Workspace Administration utility; however, the user can access Version Cue projects while working in an Adobe Create Suite component or in Acrobat.

**User** Gives the user access to some administrator privileges, such as viewing other users' information, creating new projects, and backing up and restoring projects.

**System Administrator** Grants the user all privileges.

**4** Type the user's name in the User Name box.

**5** Type a unique login in the Login box. The login is needed in Adobe Creative Suite components or in Acrobat, if a project requires it, to log in to the Version Cue Workspace Administration utility.

**6** Type a password for the user in the Password box, and type it again in the Verify Password box.

**7** (Optional) Type a phone number, an email address, and comments in the remaining text boxes. Make sure to enter an email address if the user will participate in Version Cue PDF reviews and will receive email invitations.

**8** To define the user's project access, choose the user's project privileges next to each project name in the Privileges column. To give the user the same privileges for every project, choose an option from the Set All To menu.

**9** To let a user publish a project to a specified FTP or WebDAV server, select the check box in the Publishing Privilege column next to the project name.

**10** Click Save.

### Edit a Version Cue user name

To edit a user's privileges, you need system administrator privileges.

**1** Log in to the Version Cue Workspace Administration page.

**2** Do one of the following:

- Click Edit Users in the Home page.
- Click the Users tab.

**3** Click the user name you want to edit.

**4** Edit the user properties and privileges.

**5** Click Save.

### Duplicate or delete a Version Cue user name

You can duplicate a Version Cue user to set up a new user with the same project privileges as the original user. Complete this procedure, and then change the duplicate user name and login as required.

**1** Log in to the Version Cue Workspace Administration page.

**2** Click the Users tab.

**3** Select the check box next to each user name you want to duplicate or delete. To select all listed user names, select the check box next to the User Name column label.

**4** Do one of the following:

- Click Duplicate. Edit the user's properties in the Duplicate User content frame and click Save.
- Click Delete. To confirm the deletion, click Delete in the Delete User content frame.

## Choosing user privileges

Version Cue user logins are associated with one of three levels of privilege: None, User, or System Administrator. Users with privileges set to None can't access the Version Cue Workspace Administration utility but can access Version Cue projects while working in an Adobe Creative Suite component, Acrobat, or an application that supports WebDAV. The following table describes the privileges associated with the User and System Administrator levels.

| Administration utility task | User | System Administrator |
|---|---|---|
| Create and update Version Cue user login IDs | No | Yes |
| Read other Version Cue users' login information | Yes | Yes |
| Update own user login information excluding login ID privilege level | Yes | Yes |
| Duplicate and delete user IDs | No | Yes |
| Import and export user lists | No | Yes |
| Create new projects (users must have Project Creation Allowed selected in their privileges) | Yes | Yes |
| Delete or restore project backups | No | Yes |
| Perform all tasks listed in the Advanced content frame | No | Yes |

| Administration utility task | User | System Administrator |
|---|---|---|
| Change the Version Cue Administration utility color scheme in the Advanced preferences | Yes | Yes |
| Reset locks and remove file versions from projects to which the user is assigned and also granted administrator privileges | Yes | Yes |
| Back up, delete, and restore all Version Cue Workspace data | No | Yes |
| View Version Cue Workspace information, logs, and reports; and save reports | Yes | Yes |
| Delete reports for projects to which the user is assigned and also granted administrator privileges | Yes | Yes |

## Import and export users

If you want to add a set of users to another computer with a Version Cue Workspace, you can export the list and then copy it to the UsersExport folder in the Version Cue application folder of another computer with a Version Cue Workspace.

### Export a list of users

**1** Log in to the Version Cue Administration utility.

**2** Click the Users tab.

**3** Select the check box next to each user name you want to export. To select all listed user names, select the check box next to the User Name column label.

**4** Click Export List. The Export Users content frame displays the list of users to be exported.

**5** Click Next, and type a name for the list in the Name box. If you like, type remarks in the Comments box.

**6** Click Save. The Export Users content frame displays the list of exported users.

**7** The location of the user list appears under the Export Users heading. To import this list into another Version Cue Workspace, copy this file into the destined workspace's Data/UsersExport folder in the Version Cue application folder. Note that this folder can be moved and may be in a different location on the workspace.

### Import users from a list

**1** Log in to the Version Cue Administration utility.

**2** Click the Users tab, and then click Import Users.

**3** Click the name of the user list you want to import.

**4** Select the check box next to each user name you want to import, or select the check box next to the User Name column label to select all listed user names.

**5** Click Next.

# Viewing logs, reports, and workspace information

## Viewing Version Cue Workspace information and reports

You can display the Version Cue Workspace version, name, licensee, serial number, Java version, database version, Version Cue client URL (IP or DNS address), WebDAV client URL, copyright, and patent information with the Version Cue Workspace Administration utility.



*Users who are working in Adobe Creative Suite or Acrobat can use the Version Cue Client URL to connect to Version Cue projects when they're not on the workspace's subnetwork. Users who are working in applications that support WebDAV can use the WebDAV Client URL to connect to Version Cue projects.*

You can also display and manage three kinds of reports (import, export, and publish) and the Version Cue Workspace log file, which tracks all server operations according to the level of detail you specify.

Display time varies according to the size of the log file. The default log file size is 1024 KB. If the log file exceeds a specified size limit, the system creates a new log file and saves the old one. Log files are saved in the Logs folder, located in the Version Cue application folder.

## View Version Cue Workspace information

**1** Log in to the Version Cue Administration utility.

**2** Do any of the following:

- Click the Home tab. Workspace information is listed under About This Workspace.
- Click the Advanced tab, and then select Workspace Info.
- Click About at the top of the page to display copyright and patent information. A window opens, listing information about the Version Cue Workspace.

## View the Version Cue Workspace log file

**1** Log in to the Version Cue Administration utility.

**2** Click the Advanced tab, and then select Workspace Log. The Workspace Log content frame displays information about the Version Cue Workspace history.

**3** Do any of the following:

- To change the number of rows displayed, choose an option from the Rows To Display menu.
- To navigate to a different page of the log, click Next, End, Beginning, or Previous, if available.

## View a Version Cue report

**1** Log in to the Version Cue Administration utility.

**2** Click the Advanced tab, and then select Reports.

**3** Choose the type of report you want to view from the Reports menu.

**4** To view available reports from a single project, choose the project name from the Filter By menu. To view available reports from all projects on the Version Cue Workspace, choose All.

**5** Click the project's name in the Project Name column. The content frame displays the report. Choose options from the available menus to change how the report appears.

**6** To save an HTML copy of the report to your computer, click Save, and specify a location.

**7** To return to the report list, click Report List.

### Delete Version Cue reports

**1** Log in to the Version Cue Administration utility.

**2** Click the Advanced tab, and then select Reports.

**3** Choose the type of report you want to delete from the Reports menu:

- To delete all reports from a single project, choose the project name from the Filter By menu.
- To delete all reports from two or more projects on the Version Cue Workspace, choose All.

**4** Select the check box next to each project whose reports you want to delete. To select all project reports, select the check box next to the Project Name column label.

**5** Click Delete.

# Version Cue PDF reviews

### About Version Cue PDF reviews

Using Version Cue you can set up and conduct web-based reviews of PDF documents that are in a Version Cue Workspace. You can invite selected reviewers by email, create the email message in your email program, and include a direct link to the review document in the message. Invited reviewers only need Adobe Acrobat software and a Version Cue login to access the PDF document using their web browser. As the review progresses, reviewers upload their comments to the Version Cue Workspace. In an open review, all reviewers can see each other's comments in the PDF document as the review progresses.

You can specify when the review ends or stop a review at any time. When a review is complete, you can view all comments either in the context of the original document or as a list in the Version Cue Administration utility. When you view the comments in the context of the PDF document, all of the Acrobat commenting tools are available, including printing.

Version Cue PDF reviews are especially useful in the late stages of a project when there isn't time to arrange a traditional paper-based review. They are also useful when reviewers are dispersed over a wide geographical area. Aggregated comments make it easy to summarize comments and track the progress of the review.

### Start a new Version Cue PDF review

You use the Version Cue Administration utility to initiate and manage a Version Cue PDF review. From the Version Cue PDF review area in the utility, you can start reviews and invite reviewers, find reviews in which you're participating, search for review documents, view review comments (as well as filter the comments by reviewer), stop reviews, and delete finished reviews. You can also reopen completed reviews.

Keep in mind the following requirements for using Version Cue PDF review:

- To use Version Cue PDF review, reviewers need a Version Cue login name and privileges that allow them to log in to the Version Cue Workspace hosting the review.
- To view the PDF and add comments, users need Acrobat 7.0 Professional or later. For more information about commenting in Acrobat, see Acrobat Help.

- To access a review, users need an Internet connection.

You can start a Version Cue PDF review for any version of any PDF document that is in a Version Cue Workspace, provided that you have appropriate privileges to access the Version Cue Administration utility. Only one version of a PDF document may be in active review at any point in time.

At any time, to return to the main Version Cue CS2 Review page, click the Home button . To return to Version Cue Administration, click Version Cue CS2 Administration.

**1** Log in to the Version Cue Administration utility. (For instructions, see "Log in to and out of the Version Cue Administration utility" on page 359.)

**2** Click the Version Cue CS2 Review link at the top of the page.

**3** Do one of the following:

- On the main Version Cue CS2 Review page, click Start A Review.
- Click the Documents tab, and choose Not Started from the Review Status menu.

**4** In the Document List, click the name of the PDF document you want to review.

**5** Choose the version you want to review, and then click Start Review.

**6** On the Start Review page, enter review information:

- To set an end date for the review, select Deadline, and then choose the end date from the Year, Month, and Day menus.
- To let reviewers see each other's comments, select Open under Review Mode. Select Private if you want reviewers to see only their own comments.
- If you want to add a description of the review, type the information in the Description box.
- To add reviewers, select the reviewers' names in the Reviewers section (click the check box next to the Reviewers column label to select or deselect all reviewers).

***Note:*** *If a reviewer is outside your everyday workgroup and doesn't have a Version Cue login, you'll need to set one up in advance. You must also provide network access—typically through a firewall—for outside reviewers.*

**7** Click Next.

**8** To send an email invitation to reviewers, select Send E-Mail Invitation, and then modify the Mail Subject and Mail Message as desired. In the E-Mail Recipients section, choose reviewers you wish to invite by email.

**9** Click Start Review to activate the review.

**10** If you chose to invite reviewers by email, Version Cue starts your email program and displays an email message addressed to the reviewers. The message includes a direct link to the document being reviewed. Confirm the contents of the message, and send it.

## Manage PDF reviews

After you locate a PDF review, you can open it, view or delete review comments, stop or restart a review, or delete the review from the Version Cue Workspace.

When you delete a review, Version Cue permanently removes the review comments. However, review comments for a PDF file are also deleted if you permanently delete the file itself from the Version Cue Workspace. Note that if you delete only a version of a PDF file from the workspace, the review comments for that version are deleted.

## See also

"Start a new Version Cue PDF review" on page 373

"Delete files and folders" on page 351

### Locate PDF reviews

1 Log in to the Version Cue Administration utility.

2 Click the Version Cue CS2 Review link at the top of the page.

3 Do one of the following:

- If you don't know the name of the PDF document under review, or want to view all active reviews, click Active Reviews on the Home tab. Alternatively, click the Documents tab and choose Active from the Review Status menu.
- If you don't know the name of the PDF document for which a review has been completed, or want to view all completed reviews, click Finished Reviews on the Home tab. Alternatively, click the Documents tab and choose Finished from the Review Status menu.
- If you want to search for a PDF document that is under review or for which a review has been completed, click Search Documents on the Home tab, and choose search criteria from the Project Name, Review Status, and List Entries menus. To find a PDF document by its name, enter the name or part of it in the Document Name field. Click Search.

### Open an active or completed PDF review

1 Locate the active or completed review.

2 Click the PDF document name in the Document List, and then select any of the versions in the Document History list.

### Stop a PDF review

1 Locate the active review.

2 Click the PDF document name in the Document List.

3 In the Document History list, select the active review and click Stop Review.

### Restart a completed PDF review

1 Locate the completed review.

2 Click the PDF document name in the Document List.

3 In the Document History list, select the completed review and click Start Review. Adjust review settings as desired.

***Note:*** *After you click Start Review, you see a series of screens that refer to starting, rather than restarting, a review. However, this procedure does restart the review of the existing document.*

### Delete a PDF review

1 Locate the active or completed review.

2 Click the PDF document name in the Document List.

3 In the Document History list, select a version and click Delete Review.

4 When Version Cue prompts you to delete the review, click Delete.

### Edit review settings

1 Locate the active or completed review.

**2** Click the PDF document name in the Document List.

**3** Select one of the versions in the Document History list, and click Edit Review Settings.

**4** Do any of the following:

- To set or change an end date for the review, select Deadline, and then choose the end date from the Year, Month, and Day menus.
- To let reviewers see each other's comments, select Open under Review Mode. Select Private if you want reviewers to see only their own comments.
- If you want to add or edit a description of the review, type the information in the Description box.
- To add or remove reviewers, select or deselect the reviewers' names in the Reviewers section (click the check box next to the Reviewers column heading to select or deselect all reviewers).

**5** Click Next.

**6** To send an email invitation to reviewers, select Send E-Mail Invitation, and then modify Mail Subject and Mail Message as desired. In the E-Mail Recipients section, choose reviewers you wish to invite by email.

**7** Click Save Review. If you chose to invite reviewers by email, Version Cue starts your email program and displays an email message addressed to the reviewers. This message includes a direct link to the document being reviewed. Confirm the contents of the message, and send it.

#### Set viewing options in the Document List

You can filter the Document List on the Documents tab by doing one or more of the following:

- To display only PDF documents in a specific project, choose that project from the Project menu.
- To limit the number of documents displayed, choose an option from the List Entries menu (use the arrows to the right of the List Entries menu to view additional files).
- To limit the list according to document name, enter part of a document name in the Document Name field and press Enter (Windows) or Return (Mac OS). (To view all files again, delete the text in the Document Name field and press Enter or Return.)
- To sort the list by the entries in a column, click the column heading. (Click the heading again to reverse the sort order.)

## View or delete PDF review comments

Review comments include, in addition to the text of the comment itself, information about who created the comment and when, what type of comment was created, and what page of the document the comment appears on. Different comment types are distinguished by their icons. You can use any of the Acrobat commenting tools in a Version Cue PDF review.

Version Cue stores review comments in the Version Cue Workspace. You can view comments in the Version Cue Administration utility or directly in the PDF document. To view all review comments directly in the document, you must access the document either by using the link from the review invitation or by opening the review document from the Version Cue Administration utility. (If you open the review document from the Open dialog box in Acrobat, the review comments aren't visible.)

For more information about Acrobat commenting tools, search for "commenting" in Acrobat Help.

**1** Locate the review (see "Manage PDF reviews" on page 374).

**2** Click the PDF document in the Document List.

**3** Do one of the following:

- To view all review comments directly in the PDF document, click the version name.
- To view review comments in the Version Cue Administration utility, select the version in the Document History list and click View Comments.



*To view any of the comments in the context of the PDF document, select a comment and then click Open In Acrobat.*

- To delete review comments in the Version Cue Administration utility, select the comment and click Delete Comments. (To select all comments, click the check box next to the Page column heading.)

# Chapter 17: Keyboard shortcuts

This section lists common shortcuts for moving around a document.

## Keyboard shortcuts

### Keys for selecting tools

To enable single-key shortcuts, choose Edit > Preferences > General, and then select the Use Single-Key Accelerators To Access Tools option.

| Tool | Windows action | Mac OS action |
|---|---|---|
| Hand tool | H | H |
| Temporarily select Hand tool | Spacebar | Spacebar |
| Select tool | V | V |
| Snapshot tool | G | G |
| Cycle through zoom tools | Shift+Z | Shift+Z |
| Current zoom tool | Z | Z |
| Temporarily select Dynamic Zoom tool (when Marquee Zoom tool is selected) | Shift | Shift |
| Temporarily zoom out (when Marquee Zoom tool is selected) | Ctrl | Option |
| Select Object tool | R | R |
| Object Data tool | O | O |
| Article tool | A | A |
| Crop tool | C | C |
| Link tool | L | L |

## Keys for editing

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Select all content | Ctrl+A | Command+A |
| Deselect all content | Ctrl+Shift+A | Command+Shift+A |
| Fit page | Ctrl+0 | Command+0 |

## Keys for working with comments

To enable single-key shortcuts, select the Use Single-Key Accelerators To Access Tools option in General preferences.

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Sticky Note tool | S | S |
| Text Edits tool | E | E |
| Stamp tool | K | K |
| Current highlighting tool | U | U |
| Cycle through highlighting tools: Highlighter, Cross-Out Text, Underline Text | Shift+U | Shift+U |
| Arrow tool | D | D |
| Cycle through drawing tools: Rectangle, Oval, Line, Polygon, Polygon Line, Pencil Tool, Eraser Tool | Shift+D | Shift+D |
| Text Box tool | X | X |
| Attach file as comment | J | J |
| Cycle through attach tools: Attach File, Attach Sound, Paste Clipboard Image | Shift+J | Shift+J |
| Move focus to comment | Tab | Tab |
| Move focus to next comment | Shift+Tab | Shift+Tab |

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Open pop-up window for comment that has focus | Enter | Return |
| Send and receive comments in browser-based review | O | O |
| Go back online | I | I |

## Keys for navigating a PDF

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Previous screen | Page Up | Page Up |
| Next screen | Page Down | Page Down |
| First page | Home or Shift+Ctrl+Page Up or Shift+Ctrl+Up Arrow | Home or Shift+Command+Up Arrow |
| Last page | End or Shift+Ctrl+Page Down or Shift+Ctrl+Down Arrow | End or Shift+Command+Down Arrow |
| Previous page | Left Arrow or Ctrl+Page Up | Left Arrow or Command+Page Up |
| Next page | Right Arrow or Ctrl+Page Down | Right Arrow or Command+Page Down |
| Previous view | Alt+Left Arrow | Command+Left Arrow |
| Next view | Alt+Right Arrow | Command+Right Arrow |
| Previous document (with multiple PDFs open in a single document window) | Alt+Shift+Left Arrow | Not available |
| Next document (with multiple PDFs open in a single document window) | Alt+Shift+Right Arrow | Not available |
| Scroll up | Up Arrow | Up Arrow |
| Scroll down | Down Arrow | Down Arrow |

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Scroll (when Hand tool is selected) | Spacebar | Spacebar |
| Zoom in | Ctrl+equal sign | Command+equal sign |
| Zoom out | Ctrl+hyphen | Command+hyphen |

## Keys for general navigating

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Show/hide menu bar | F9 | Shift+Command+M |
| Move focus to menus | F10 | Control+F2 |
| Move focus to toolbar in browser | Shift+F8 | Shift+F8 |
| Move to next open document (when focus is on document pane) | Ctrl+F6 | Command+F6 |
| Move to previous open document (when focus is on document pane) | Ctrl+Shift+F6 | Command+Shift+F6 |
| Close current document | Ctrl+F4 | Command+F4 |
| Close all open windows | Ctrl+Shift+W | Command+Shift+W |
| Move focus to next tabbed page or palette | F6 | F6 |
| Move focus to previous pane or panel | Shift+F6 | Shift+F6 |
| Move focus to next comment, link, or form field in the document pane | Tab | Tab |
| Move focus to document pane | F5 | F5 |
| Move focus to previous comment, link, or form field in the document pane | Shift+Tab | Shift+Tab |
| Activate selected tool, item (such as a movie or bookmark), or command | Spacebar or Enter | Spacebar or Enter |
| Open context menu | Shift+F10 | Control+click |

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Close context menu | F10 | Esc |
| Return to Hand tool or Select tool | Esc | Esc |
| Move focus to next tab in a tabbed dialog box | Ctrl+Tab | Not available |
| Move to next search result and highlight it in the document | F3 | F3 or Command+G |
| Select text (with Select tool selected) | Shift+Arrow keys | Shift+Arrow keys |
| Select next word or deselect previous word (with Select tool selected) | Ctrl+Right Arrow or Left Arrow | Command+Right Arrow or Left Arrow |

## Keys for working with navigation panels

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Show/hide navigation pane | F4 | F4 |
| Open and move focus to navigation pane | Ctrl+Shift+F5 | Command+Shift+F5 |
| Move focus among the document, message bar, and navigation panels | F6 | F6 |
| Move focus to next element of the active navigation panel: Trash Can, Options menu, Close box, panel contents, or panel button | Tab | Tab |
| Move to previous or next navigation panel and make it active (when focus is on the panel button) | Up Arrow or Down Arrow | Up Arrow or Down Arrow |
| Move to next navigation panel and make it active (when focus is anywhere in the navigation pane) | Ctrl+Tab | Not available |
| Expand the current bookmark (focus on Bookmarks panel) | Right Arrow or Shift+plus sign | Right Arrow or Shift+plus sign |

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Collapse the current bookmark (focus on Bookmarks panel) | Left Arrow or minus sign | Left Arrow or minus sign |
| Expand all bookmarks | Shift+* | Shift+* |
| Collapse selected bookmark | Forward Slash (/) | Forward Slash (/) |
| Move focus to next item in a navigation panel | Down Arrow | Down Arrow |
| Move focus to previous item in a navigation panel | Up Arrow | Up Arrow |

## Keys for navigating the Help window

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Open Help window | F1 | F1 or Command+? |
| Close Help window | Ctrl+W or Alt+F4 | Command+Q |
| Move focus between navigation pane and topic pane | Ctrl+Tab | Not available |
| Move focus to the next link within a pane | Tab | Not available |
| Move focus to the previous link within a pane | Shift+Tab | Not available |

## Keys for navigating the How To panel

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Open or close How To panel | Shift+F4 | Shift+F4 |
| Open and move focus to How To panel | Shift+F1 | Shift+F1 |
| Go to How To home page from a How To topic | Home | Not available |
| Move focus between the elements of the How To panel and the header of the How To panel | Ctrl+Tab or Ctrl+Shift+Tab | Not available |

| Result | Windows Action | Mac OS Action |
|---|---|---|
| Move focus down through the elements of the How To panel | Tab | Tab |
| Move focus up through the elements of the How To panel | Shift+Tab | Shift+Tab |
| Go forward to next page in How To panel viewing history | Right Arrow | Right Arrow |
| Go back to previous page in How To panel viewing history | Left Arrow | Left Arrow |

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